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AN IRVING CLOUD PUBLICATION

# JobberTopics®

JULY 1986/Price $35.00

# 82ND ANNUAL MARKETING DIRECTORY ISSUE

## FOLLOW THE SIGNS

- Of direct interest to all **EXECUTIVES**
- "Must" reading for outside **SALESMEN**
- Not to be missed by **COUNTERMEN**
- For those concerned with **MACHINE SHOP**
- For those interested in **RETAIL SALES**

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# Economy With Soft Spots Finds Jobbers 'Toughing It Out'

***Nearly 30 percent say dollar sales are up, but 45 percent say they're down. 'We are hanging on,' says South Dakotan, 'hoping to outlast (market problems)' . . .***

**By BILL ELLIS**
Managing Editor

In response to our annual in-depth "How's Business" survey, a South Dakota jobber listed problems in his market area, then said, "We are hanging on, hoping to outlast these situations." He might have been speaking for other jobbers in the panel, as well as the nation, as they confront what has been touted as a good economy, but what in fact is an economy with many soft spots—at least for the automotive aftermarket.

*Ellis*

In our survey, in which 300 jobbers took part, respondents were asked to compare their business in the first quarter of 1986 with the first quarter of the previous year. To get definitive answers, we asked definitive questions—concerning dollar sales, unit sales, collections, cash position, and specific markets (garages and shops; do it yourselfers; service stations).

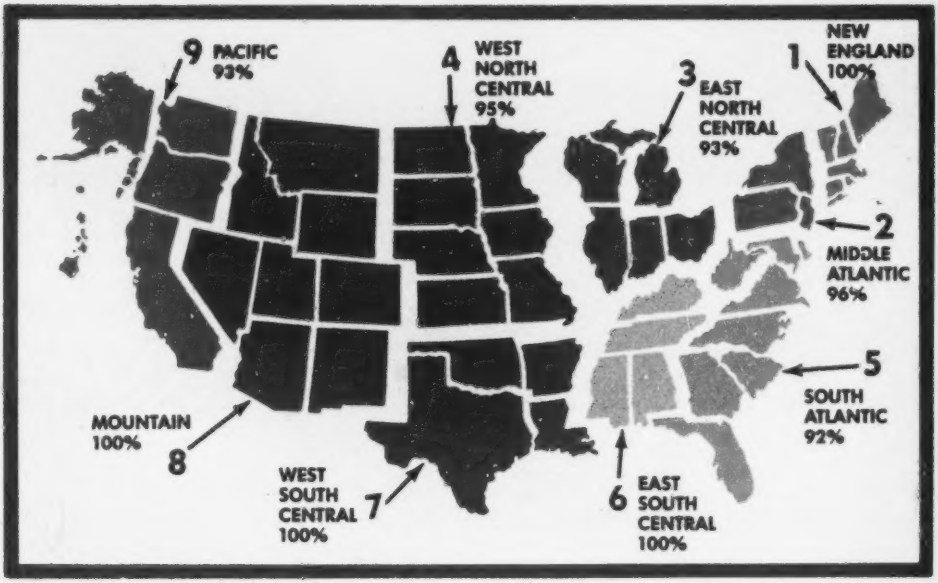
As in previous years, JOBBER TOPICS developed both national figures from its study and figures for the nine census regions of the country. The national figures give some "handles" on what's happening to the industry as a whole. The regional figures are meaningful to the individual jobber, as he sorts out and copes with business conditions in his specific section of the U.S.

Sales-impacting problems for the jobber can roughly be sorted into broadscale condition affecting many people besides automotive, and more narrow conditions affecting mainly the aftermarket. Among the former are the farm and insurance crises; among the latter are mass merchandiser competition and direct selling by WDs.

### Even cut heat expense

Problems notwithstanding, many jobbers, characteristically, are toughing it out and making sales-and-profit headway. We like this comment from an Oklahoma parts man: "Business is slow but, because I foresaw it, I prepared for it by cutting every expense possible, even the heat. With careful selection and hard work I have been able to increase sales a little over the same period last year."

Let's take a look now, from a national




perspective, at what our "How's Business" panel told us. As we do, keep in mind that our study, conducted by mail, reflects experience of jobbers who are large, small and in between, located in urban, suburban and rural settings, and scattered in all geographic sections of the U.S.

Our first area of inquiry was dollar sales. Nearly 30 percent (28.9) said sales were up, while 25.7 percent said they were the same. Added up, those figures meant that over half of How's Business constituents were at least holding their own or doing better in the first quarter of the year. The balance, 45.4 percent, reported sales down.

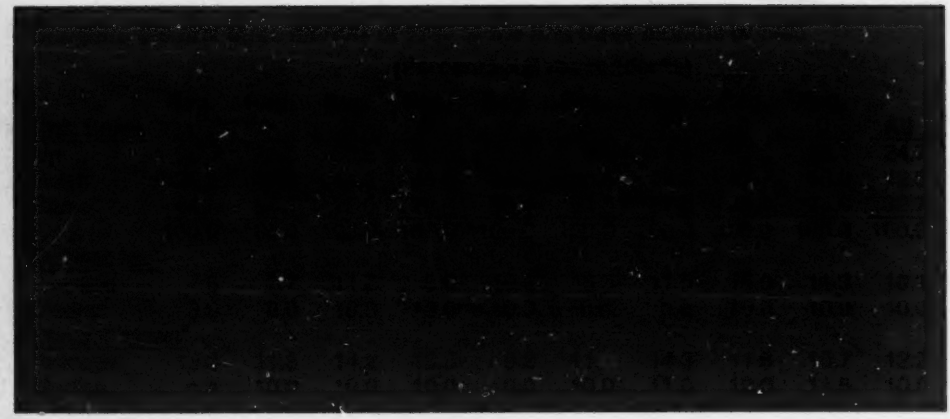
To wring the inflation factor out of jobber sales, we next asked about *unit* sales. That query dropped the sales-increase report to 24.7 percent, but raised the sales-unchanged report to 32.7 percent. Combined, those figures gave a slightly better reading—57.4 percent—for jobbers who were staying the course or improving. The number reporting unit sales to be down was 42.6 percent.

If sales *were* increasing, we wanted to know, which class of trade was contributing most to that rise. Garages and shops were the clear choice here: they were named by 17.8 percent of the growth-prone jobbers. DIYers came in second, with 11.2 percent of the "vote." Service stations, once the undisputed kingpins of the jobber's market, scored third, garnering 6.9 percent of the survey mentions.

### 22% said cash position better

Collections, which further round out the jobber's business picture, were also asked about. Slightly over 10 percent (10.3) said they were up while 32.2 percent reported them down. Over 57 percent (57.5) said they were even with those of last year.

Finally, JOBBER TOPICS asked about cash position, a business barometer which reflects not only intake of sales revenue but how well the enterprise is managed. In reply, 22 percent said their cash position was better while 41 percent reported it "the same." Together, these figures represented

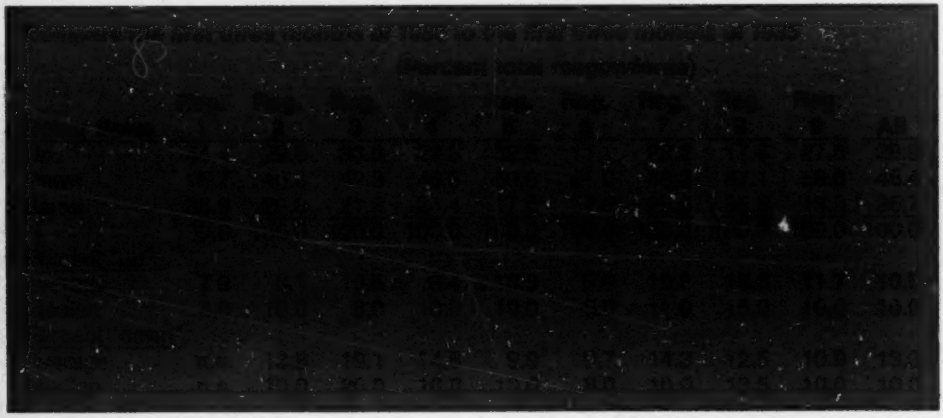


63 percent at the status quo or above it. Of the balance, 33.3 percent opted not to answer.

That, briefly, is how the national picture shaped up. The figures indicate that quite a few jobbers are in heavy economic seas right now. At the same time, however, there's a solid core keeping abreast of their 1985 performance and a fortunate number on a growth track. Countrywide, it would seem that a mood of hope mixed with caution permeates the industry. Symptomatic is this comment from an Iowa jobber: "Business has been better in 1986, so far, than in 1985, but it is spotty in segments. Collections improve on one front but falter on another. We are building inventories for anticipated sales."

As stated earlier, we analyzed our How's Business returns not only nationally but for the nine census regions. We found, as we do every year, that regional figures varied considerably from the country as a whole. Let's take a look now at each of these regions. For clarification, we have indicated, in each case, which states belong to each region.

***Region 1—New England (CT, ME, MA,***



***NH, RI, VT).*** Despite its flagging shoe and textile industries, this area, whose other products range from ball bearings to submarines, scored spectacularly in the survey. The "up" reports for dollar *and* unit sales—respectively 44.4 percent and 33.3 percent—exceeded those of any other region. Only 16.7 percent said their dollar sales were down, and the "down" report for unit sales was 22.2 percent.

While no one reported that collections were up, there were 63.2 percent who said they were unchanged. That figure was above the national average and second only to Region 5, the South Atlantic.

Nearly 28 percent, more than any other region except No. 9, the Pacific, reported a better cash position.

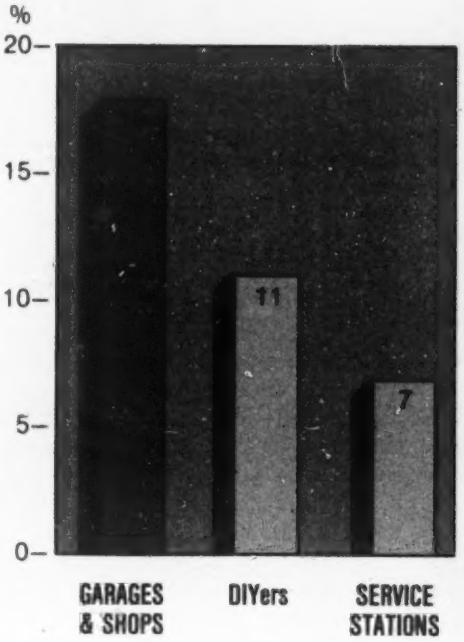
***Region 2—Middle Atlantic (NJ, NY, PA).*** In dollar and unit sales, Region 2 jobbers came fairly close to the national experience. In dollars, 29.8 percent said their sales were up, 40.4 percent reported them down, and 29.8 percent said they were the same. Unit sales? Up, said 25.5 percent; down, reported 40.4 percent; and the same, claimed 34.1 percent.

In collections, more than the average number said they were up, and fewer than the average said they were down. Almost 61 percent, vs. the national average of 57.5 percent, said they were the same.

In cash position, Mid-Atlantic jobbers didn't fare quite so well. A larger-than-average number, 25.6 percent, *did* say their cash position was better, but a larger-than-average number, 38.3 percent, said it was worse. The number saying it was about the same was 34 percent.

Commenting on cash—specifically cash flow—was a Pennsylvania jobber. He said his flow was down "because of the declining number of dealers and garages." He added that mass merchandisers were providing such stiff competition "that most dealers cannot cope."

***Markets Most Credited With Increased Sales***
**Percent total respondents**




***Region 3—East North Central (IL, IN, MI, OH, WI).*** This industrialized region, like industrialized New England, scored quite well. In sales, 36.5 percent said their dollar figure was up while 30.8 percent said their unit figure was up. That exceeded jobber experience in seven of the regions. The number reporting dollar sales down was 42.3 percent, or the third lowest number in the country. The "down" report for unit sales was less impressive, coming slightly above the national average.

Although Region 3 collection experience fell short of national figures, its cash position experience did not. Twenty five percent said their cash position was better, 30.8 percent reported it worse, and 42.3 percent claimed it was the same.

***If sales were up, which class of trade contributed most to your increase?***

**(Percent total respondents)**

| | Reg. 1 | Reg. 2 | Reg. 3 | Reg. 4 | Reg. 5 | Reg. 6 | Reg. 7 | Reg. 8 | Reg. 9 | All |
|---|---|---|---|---|---|---|---|---|---|---|
| Garages and shops | 33.3 | 64.3 | 52.6 | 19.5 | 21.7 | 7.4 | 11.1 | 5.9 | 17.2 | 17.8 |
| Do-it-yourselfers | 11.1 | 28.6 | 42.1 | 12.2 | 8.7 | 3.7 | 18.5 | 5.9 | 13.8 | 11.2 |
| Service stations | 16.7 | 35.7 | 36.8 | 2.4 | 2.2 | 0.0 | 7.4 | 5.9 | 3.4 | 6.9 |
| Other | 0.0 | 7.1 | 15.8 | 4.9 | 0.0 | 0.0 | 3.7 | 0.0 | 0.0 | 2.3 |
| Percent reporting sales "up" | 44.4 | 29.8 | 36.5 | 29.3 | 32.6 | 11.1 | 22.2 | 17.6 | 27.6 | 26.9 |
| Percent reporting sales "down" | 16.7 | 40.4 | 42.3 | 46.3 | 50.0 | 51.9 | 48.2 | 47.1 | 58.6 | 45.4 |

*Totals over 100 percent due to multiple mentions.

Among factors eroding cash for small-to-medium jobbers, said an Illinois man, was fixed costs. He particularly cited "the rise in insurance, outrageous utility bills and government taxes."

***Region 4—West North Central (IA, KS, MN, MO, NE, ND, SD).*** In contrast to national averages, reports for Region 4 were roughly equivalent when it came to dollar sales and cash position, better when it came to collections, and down when it came to unit sales.

Eleven Region 4 jobbers expanded their survey reports with comments. Predictably, over half mentioned the "farm crisis." Others mentioned "the oil economy," "auto dealers going out of business," and "the mild winter." All was not doom and gloom, however. An Iowan said "We are expecting a strong March in both new sales and increased shop work."

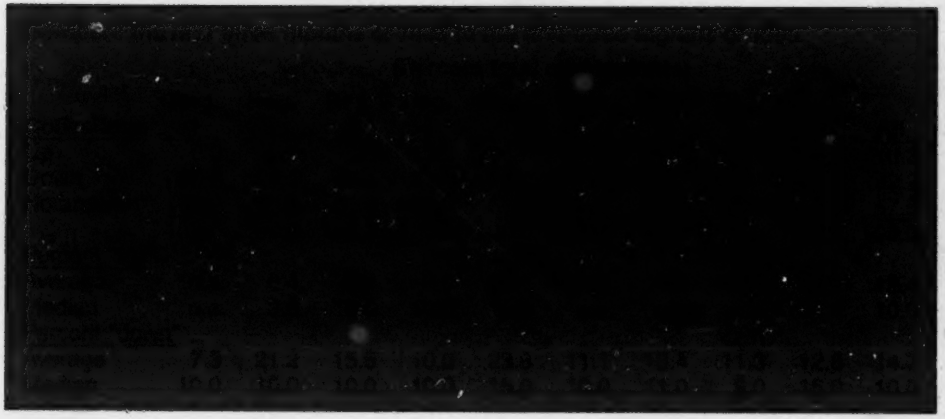
That the aftermarket has itself to blame for some of its problems was suggested by a Minnesota jobber. "We are in a town of 5,000 with seven parts jobbers," he said—hinting at overdistribution. Another respondent, whose firm was in Missouri, scored "jobbers with their own warehouse backup (who are) cutting prices on dealer business. . . ."

***Region 5—South Atlantic (DE, DC, FL, GA, MD, NC, SC, VA, WV).*** In Region 5, whose eight states comprise a good balance of industry and agriculture, figures stacked up quite well against the national norms. In unit sales, both the up and down figures—30.4 percent and 39.2 percent—were better than the nationals. In dollar sales, the up was better but the down, at 50 percent, was not.

In collections, no other region could hold a candle to No. 5. Slightly over 13 percent said collections were up and only 22.2 percent reported them down. That left 64.5 percent with collections unchanged. The comparable national figures were 10.3 percent, 32.2 percent and 57.5 percent.

That Region 5'ers were good stewards of that collected money was shown in their healthy cash position report. Their "better" report was slightly above the national average and their "worse" report had the lowest percentage of any region.

***Region 6—East South Central (AL, KY, MS, TN).*** "Business is slower than usual," said a Kentucky jobber. "Collections are down because money is tight, especially in this area—which is primarily agricultural with many small farmers." In his assessment, that jobber was probably speaking for



many others in his region.

Jobbers reporting sales up, in either dollars or units, were fewer than in any region, and over half (51.9 percent) said their dollar sales were down. Equally dismal was the collection picture, where only 3.8 percent said collections were better while 46.2 percent reported them worse.

Region 6 jobbers *could* take some solace in answers to the survey question which asked whether this or that factor was the same. More jobbers than in any other region—54.5 percent—said unit sales were the same. The response was almost as good for dollar sales and cash position.

***Region 7—West South Central (AR, LA, OK, TX).*** The "drop in oil prices," alluded to by a Texas jobber, has depressed the West South Central region. Even so, there were glimmers of hopefulness in this area's figures. Over 55 percent said their cash position was the same. That was better than any other region and over 14 percentage points above the national average. Also, while only 22.2 percent reported dollar sales were up, the actual *increase* in sales—also asked for by the survey—was up an average of 19.8 percent. That figure exceeded all other regions and was nearly 10 points above the industry norm.

Economic forces notwithstanding, some Region 7 jobbers were pushing sales ahead by dint of aggressive action. An Arkansan said, "Our increase is due to two more

*(Continued on page 96)*

# 'Toughing It Out' . . .

*(Continued from page 63)*

salesmen on the road." And an Oklahoman said his improved sales were attributable to "good service."

***Region 8—Mountain (AZ, CO, ID, MT, NV, NM, UT, WY).*** Region 8 jobbers reporting unit sales up, 23.5 percent, were close to the national average. However, 47.1 percent reported them down, and the number reporting *dollar* sales up, 17.6 percent, was well below the national average.

To jobbers who don't believe sales are made until the money is in hand, the Mountain region collection figures offered some comfort. Nearly 12 percent said collections were up while 29.4 percent reported them down and 58.8 percent said they were the same. All three figures eclipsed industry norms.

Cash position, unfortunately, was not as bright a picture as collections. Only 11.8 percent had a better cash position while 58.8 percent had one that was worse. Not quite 30 percent said theirs was the same. These figures were wide of the industry norms: 22 percent; 33.3 percent; and 41.0 percent.

***Region 9—Pacific (AK, CA, HI, OR, WA).*** Pacific figures presented some anomalies. The number of jobbers reporting dollar and unit sales up was close to the national average. The number reporting them *down*, however, was greater than any other region. Over 58 percent said dollar sales were down and 50 percent reported unit sales down.

Irregular also was the report on cash position. Nearly 30 percent, more than any other region, said their cash position was better. At the same time, though, 37 percent said their cash position was worse. The first figure was well above the national norm while the second figure was below it.

In comments appended to survey returns, three California jobbers deplored direct-selling WDs. One said every distributor in Los Angeles County was following this practice. JT

## Greensboro jobber wins Pro-Bowl sweepstakes

*Ron Hawkins (wearing the lei) of Vaughn Auto Supply, Greensboro, NC, receives Pro-Bowl tickets and transportation to Hawaii from Bob Reynolds (center left). Sonny Stanley (right) and Tim Stanley (left), both of Mid South Warehouse add their congratulations. Hankins was the national winner of Blue Chip's Pro-Bowl Trip Sweepstakes for jobbers during the Fall Blue Chip alternator and starter promotions.*

## WD joins CARQUEST

Muffler Warehouse, Inc., of Boise, ID, has joined the CARQUEST Corp., a national marketing organization based in Tarrytown, NY.

Muffler Warehouse has served the Idaho market for over 55 years.

CARQUEST currently sells through 2,200 jobbers in 47 states.

1986

# AUTOMOTIVE STATISTICS

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# Automotive Wholesalers Among Largest in 1985

## Based on Number of Branch Stores and Outside Salesmen

| | Branches | Salesmen | Shops |
|---|---|---|---|
| A & B Autom. Centers, Inc., dba Main Auto Parts, Dayton, OH | 25 | 12 | 6 |
| Arnold Motor Supply, Spencer, IA | 19 | 46 | 19 |
| Automotive, Inc., The, of Mid-America Ind., Inc., Ft. Smith, AR | 65 | 15 | 12 |
| Automotive Supply Co., Altoona, PA | 24 | 28 | 5 |
| Automotive Supply Co., Appleton, WI | 11 | 10 | 6 |
| Barnes Motor & Parts Co., Inc., Wilson, NC | 30 | 40 | 7 |
| Best Battery Co., Inc., Baltimore, ME | 10 | 60 | 3 |
| Big A Auto Parts, Inc., N. Hollywood, CA | 14 | 14 | 7 |
| Big A Auto Parts, Inc., Lebanon, PA | 24 | 24 | 3 |
| Blankenship & Co., Inc., Marion, IL | 16 | 16 | 3 |
| Brooks Auto Parts, Inc., Douglas, GA | 61 | 22 | 11 |
| Burdman Auto Parts, Inc., Kirksville, MO | 29 | 28 | 1 |
| Chanen's Auto Supply Co., Quincy, IL | 14 | 10 | 1 |
| Crow-Burlingame Co., Little Rock, AR | 60 | 59 | 4 |
| Dayton Warehouse Co., Fargo, ND | 11 | 21 | 8 |
| Dryden Oil Co., Inc., Baltimore, MD | 12 | 104 | — |
| Everson Co., Grand Forks, ND | 19 | 15 | 1 |
| Fochtman Motor Co., Petoskey, MI | 12 | 13 | 3 |
| General Automotive Supply Co., Worcester, MA | 24 | 10 | 1 |
| Genuine Parts Co., Birmingham, AL | 10 | 11 | 3 |
| Genuine Parts Co., Tampa, FL | 13 | 13 | 5 |
| Heavy Duty Parts, Inc., Parts Industries, Memphis, TN | 42 | 81 | 12 |
| Hedahls, Inc., Bismark, ND | 14 | 20 | 10 |
| Inter-State Auto Supply Co., Elizabethtown, KY | 15 | 20 | 7 |
| Keenan Auto Parts Co., Heavy Duty Div., Albany, GA | 30 | 18 | 18 |
| Molin-Taylor, Inc., Buffalo, NY | 24 | 10 | 3 |
| Motor Bearings & Parts Co., Raleigh, NC | 18 | 25 | 5 |
| National Auto Supply Co., Brentwood, MO | 27 | 32 | 16 |
| Northern Auto Supply Co., Div. of Northern Industries, Marshfield, WI | 29 | 20 | 11 |
| RPS Products, Inc., Baltimore, MD | 21 | 17 | — |
| Rodefeld Co., Inc., Richmond, IN | 15 | 15 | 12 |
| Sanel Auto Parts, Inc., Concord, NH | 28 | 28 | 3 |
| Sieg Co., Davenport, IA | 16 | 12 | 1 |
| Sieg Nebraska Co., Omaha, NE | 10 | 11 | — |
| Steego Auto Parts, Wapole, MA | 39 | 17 | 8 |
| Sturdevant's Inc., Wahpeton, ND | 13 | 10 | 5 |
| Western Auto Parts Co., Fargo, ND | 11 | 20 | 8 |
| Wharton & Barnard, Inc., Milford, DE | 10 | 14 | 3 |
| Womwell Automotive Parts Co., Inc., Lexington, KY | 20 | 14 | 3 |
| Woolwine Supply Co., The, Pratt, KS | 11 | 12 | 3 |

Source: JOBBER TOPICS, Directory of Automotive Jobbers, 1985-86.

# Scope of the Automotive Service Industry—In Brief

| Category | Number |
|---|---|
| Motor vehicle manufacturers (1982) | 355[1] |
| Motor vehicle parts and accessories manufacturers (1982) | 2,420[1] |
| Automotive production remanufacturers | 1,650[2] |
| Manufacturers merchandise agents and brokers selling automotive parts and supplies (i.e., manufacturers' agents) (1982) | 1,018[3] |
| Manufacturers' sales branches and sales offices selling automotive parts and supplies (1982) | 705[3] |
| Automotive distributors/outlets (1986) | 29,371[4] |
| Gasoline service stations and truck stops qualified for repair and service work (1986) | 77,606[5] |
| Automobile repair shops (1982) | 88,445[6] |
| New car dealers (1982) | 25,641[7] |
| Used car dealers (1982) | 11,551[7] |
| Fleets (of 10 or more vehicles—1982) | 34,150[10] |
| Merchant wholesalers of farm and garden machinery and equipment (1982) | 13,204[3] |
| National trade associations and industry groups (1985) | 105[9] |
| State and regional (multi-state) trade associations (1985) | 39[9] |

## National Sales Figures

| | |
|---|---|
| Sales of merchant wholesalers of automotive parts and supplies (1982) | $ 33.5 billion[11] |
| Automotive parts and service sales at retail (1985) | $101.1 billion[12] |

Sources: [1]U.S. Census of Manufacturers (1982). [2]Estimates by the Automotive Parts Rebuilders Assn. [3]U.S. Census of Wholesale Trade (1983). [4]JOBBER TOPICS magazine (1986). [5]SUPER SERVICE STATION magazine (1986). [6]U.S. Census of Service Industries (1982). [7]U.S. Census of Retail Trade (1982). [8]National Automobile Dealers Assn. [9]JOBBER TOPICS magazine (1985). [10]FLEET EQUIPMENT magazine (1986). [11]U.S. Department of Commerce. [12]National Automobile Dealers Assn.

# Total Parts and Service Market: 1980-1985

## (Billions of Dollars)

| | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 |
|---|---|---|---|---|---|---|
| Franchised New Car Dealerships | $22.7 | $23.1 | $24.5 | $26.8 | $30.7 | $33.6 |
| Auto Repair Shops[1] | 17.1 | 18.0 | 20.4 | 22.7 | 25.4 | 27.9 |
| Tire, Battery, and Accessory Dealers | 15.7 | 17.5 | 18.4 | 20.3 | 21.3 | 22.0 |
| Gasoline Service Stations | 5.7 | 5.9 | 5.9 | 6.4 | 7.1 | 7.9 |
| General Merchandise Stores | 5.0 | 5.3 | 5.4 | 5.8 | 6.4 | 6.7 |
| All Others[2] | 1.7 | 2.0 | 2.3 | 2.5 | 2.7 | 3.0 |
| Total | 67.9 | 71.8 | 76.9 | 84.5 | 93.6 | 101.1 |

Source: National Automobile Dealers Assn., Industry Analysis Div. and U.S. Bureau of Census. [1]Includes independent and franchised repair shops. [2]Includes non-franchised dealers, farm equipment dealers, and fleet shops. NOTE: Revenue for each type of repair facility includes tire sales and parts not installed in repair work. Revenue totals do not include fuel and lubricant sales.

# State-by-State Look

| State | Car Registration[1] | Truck & Bus Registration[1] | Total Registration[1] | Automotive Wholesaling Outlets[2] |
|---|---|---|---|---|
| Ala. | 2,274,000 | 961,000 | 3,235,000 | 620 |
| Alaska | 236,000 | 146,000 | 382,000 | 41 |
| Ariz. | 1,500,000 | 619,000 | 2,119,000 | 326 |
| Ark. | 991,000 | 529,000 | 1,520,000 | 440 |
| Calif. | 14,274,000 | 4,010,000 | 18,284,000 | 2,310 |
| Colo. | 2,078,000 | 773,000 | 2,851,000 | 424 |
| Conn. | 2,263,000 | 159,000 | 2,422,000 | 428 |
| Del. | 379,000 | 99,000 | 478,000 | 74 |
| D. of C. | 214,000 | 19,000 | 233,000 | 22 |
| Fla. | 7,886,000 | 1,975,000 | 9,861,000 | 1,446 |
| Ga. | 2,979,000 | 1,627,000 | 4,606,000 | 821 |
| Hawaii | 578,000 | 84,000 | 662,000 | 94 |
| Idaho | 562,000 | 409,000 | 971,000 | 194 |
| Ill. | 6,211,000 | 1,558,000 | 7,769,000 | 1,337 |
| Ind. | 3,014,000 | 1,032,000 | 4,046,000 | 782 |
| Iowa | 1,743,000 | 705,000 | 2,448,000 | 618 |
| Kan. | 1,476,000 | 681,000 | 2,157,000 | 440 |
| Ky. | 1,769,000 | 822,000 | 2,591,000 | 541 |
| La. | 2,074,000 | 941,000 | 3,015,000 | 508 |
| Maine | 604,000 | 222,000 | 826,000 | 215 |
| Md. | 2,769,000 | 553,000 | 3,322,000 | 396 |
| Mass. | 3,332,000 | 470,000 | 3,802,000 | 710 |
| Mich. | 5,279,000 | 1,382,000 | 6,661,000 | 1,160 |
| Minn. | 2,274,000 | 696,000 | 2,970,000 | 467 |
| Miss. | 1,047,000 | 396,000 | 1,443,000 | 345 |
| Mo. | 2,626,000 | 949,000 | 3,575,000 | 835 |
| Mont. | 396,000 | 281,000 | 677,000 | 158 |
| Neb. | 833,000 | 430,000 | 1,263,000 | 276 |
| Nev. | 540,000 | 215,000 | 755,000 | 76 |
| N.H. | 773,000 | 132,000 | 905,000 | 152 |
| N.J. | 4,412,000 | 495,000 | 4,907,000 | 867 |
| N.M. | 760,000 | 457,000 | 1,217,000 | 178 |
| N.Y. | 7,774,000 | 1,158,000 | 8,932,000 | 1,754 |
| N.C. | 3,190,000 | 1,227,000 | 4,417,000 | 989 |
| N.D. | 434,000 | 278,000 | 712,000 | 122 |
| Ohio | 6,621,000 | 1,396,000 | 8,017,000 | 1,252 |
| Okla. | 1,744,000 | 1,025,000 | 2,769,000 | 460 |
| Ore. | 1,599,000 | 629,000 | 2,228,000 | 326 |
| Pa. | 5,867,000 | 1,293,000 | 7,160,000 | 1,446 |
| R.I. | 554,000 | 88,000 | 642,000 | 132 |
| S.C. | 1,644,000 | 506,000 | 2,150,000 | 438 |
| S.D. | 411,000 | 240,000 | 651,000 | 116 |
| Tenn. | 2,864,000 | 748,000 | 3,612,000 | 660 |
| Texas | 8,681,000 | 3,961,000 | 12,642,000 | 2,026 |
| Utah | 759,000 | 344,000 | 1,103,000 | 171 |
| Vt. | 293,000 | 94,000 | 387,000 | 98 |
| Va. | 3,571,000 | 627,000 | 4,198,000 | 662 |
| Wash. | 2,517,000 | 1,059,000 | 3,576,000 | 569 |
| W. Va. | 1,022,000 | 429,000 | 1,451,000 | 210 |
| Wis. | 2,382,000 | 739,000 | 3,121,000 | 550 |
| Wyo. | 291,000 | 205,000 | 496,000 | 87 |
| TOTAL | 130,364,000 | 39,873,000 | 170,237,000 | 29,369 |

Sources: [1]U.S. Federal Highway Administration, Tables SS83-4, 1985. [2]JOBBER TOPICS Circulation File (1986). [3]Vehicles per wholesaling outlet obtained by dividing outlets into total registration. Final figure is average for all states. [4]R. L. Polk & Co.

# at the Wholesaler's Market

| Vehicles Per Wholesaling Outlet[3] | Car Dealers[4] | Truck & Trailer Dealers[4] | Service Stations & Truck Stops[4] | Auto Repair Shops[4] | State |
|---|---|---|---|---|---|
| 5,218 | 383 | 298 | 1,255 | 1,691 | Ala. |
| 9,317 | 47 | 24 | 187 | 164 | Alaska |
| 6,500 | 208 | 109 | 699 | 1,507 | Ariz. |
| 3,455 | 358 | 206 | 1,313 | 1,083 | Ark. |
| 7,915 | 1,898 | 764 | 5,643 | 14,991 | Calif. |
| 6,724 | 316 | 161 | 968 | 1,944 | Colo. |
| 5,659 | 402 | 180 | 1,288 | 1,577 | Conn. |
| 6,459 | 76 | 46 | 202 | 299 | Del. |
| 10,591 | 16 | 11 | 134 | 403 | D. of C. |
| 6,820 | 1,064 | 404 | 2,809 | 5,757 | Fla. |
| 5,610 | 619 | 361 | 1,863 | 2,825 | Ga. |
| 7,043 | 70 | 48 | 338 | 567 | Hawaii |
| 5,005 | 161 | 85 | 475 | 484 | Idaho |
| 5,811 | 1,271 | 603 | 3,335 | 5,030 | Ill. |
| 5,174 | 666 | 381 | 1,918 | 2,577 | Ind. |
| 3,961 | 584 | 320 | 1,870 | 1,526 | Iowa |
| 4,902 | 401 | 213 | 1,397 | 1,312 | Kan. |
| 4,789 | 417 | 277 | 1,531 | 1,355 | Ky. |
| 5,935 | 429 | 264 | 1,219 | 2,035 | La. |
| 3,842 | 159 | 79 | 495 | 537 | Maine |
| 8,389 | 354 | 185 | 1,311 | 1,798 | Md. |
| 5,355 | 630 | 262 | 2,031 | 3,104 | Mass. |
| 5,742 | 899 | 448 | 2,534 | 3,887 | Mich. |
| 6,360 | 559 | 268 | 2,073 | 1,706 | Minn. |
| 4,183 | 315 | 169 | 698 | 984 | Miss. |
| 4,281 | 640 | 349 | 2,426 | 2,659 | Mo. |
| 4,285 | 182 | 112 | 545 | 483 | Mont. |
| 4,576 | 302 | 160 | 1,180 | 944 | Neb. |
| 9,934 | 82 | 53 | 253 | 492 | Nev. |
| 5,954 | 174 | 96 | 392 | 498 | N.H. |
| 5,660 | 797 | 289 | 3,037 | 4,052 | N.J. |
| 6,837 | 153 | 95 | 549 | 721 | N.M. |
| 5,092 | 1,569 | 552 | 4,866 | 8,214 | N.Y. |
| 4,466 | 708 | 347 | 2,097 | 2,746 | N.C. |
| 5,836 | 187 | 129 | 522 | 292 | N.D. |
| 6,403 | 1,146 | 553 | 3,063 | 5,039 | Ohio |
| 6,020 | 457 | 253 | 1,248 | 1,483 | Okla. |
| 6,834 | 339 | 193 | 914 | 1,375 | Ore. |
| 4,952 | 1,470 | 669 | 4,141 | 5,996 | Pa. |
| 4,864 | 83 | 32 | 372 | 544 | R.I. |
| 4,909 | 351 | 153 | 1,169 | 1,357 | S.C. |
| 5,612 | 166 | 73 | 580 | 357 | S.D. |
| 5,473 | 493 | 390 | 1,536 | 2,099 | Tenn. |
| 6,240 | 1,830 | 846 | 3,879 | 8,481 | Texas |
| 6,450 | 168 | 91 | 552 | 744 | Utah |
| 3,949 | 96 | 42 | 247 | 261 | Vt. |
| 6,341 | 570 | 293 | 1,840 | 2,496 | Va. |
| 6,285 | 408 | 210 | 1,297 | 2,148 | Wash. |
| 6,910 | 277 | 139 | 795 | 630 | W. Va. |
| 5,675 | 709 | 419 | 2,174 | 1,925 | Wis. |
| 5,701 | 107 | 63 | 356 | 302 | Wyo. |
| 5,888[3] | 25,766 | 12,761 | 77,606 | 115,481 | TOTAL |

Marketing Services Division (1986). [2]SUPER SERVICE STATION Circulation File (1986). Figures represent service stations and truck stops qualified for automotive repair and service work. [4]U.S. Census of Business (1982).

# ASIA Wholesaler's Costs, Income And Profit as Percentage of Sales

| | Median Wholesaler (1984) |
|---|---|
| SALES | 100.00% |
| Cost of Goods Sold | 65.57% |
| GROSS MARGIN OF PROFIT (Sales minus cost of goods sold) | 34.43% |
| SELLING EXPENSE (Includes: Advertising & sales promotion; salesmen's salaries, commission, travel, etc.; sales supervisory salaries & commissions; countermen's salaries & commissions.) | 9.72% |
| DELIVERY EXPENSE (Includes: Delivery salaries (including bonuses); vehicle operating expenses; depreciation—vehicle equipment; transportation out and parcel post.) | 2.53% |
| STORE AND OCCUPANCY EXPENSE (Includes: Stockroom wages; heat, light & water; rent (or depreciation.)) | 5.28% |
| GENERAL AND ADMINISTRATIVE EXPENSE (Includes: Executive salaries & bonuses; supervisory salaries & bonuses; clerical salaries, wages & bonuses; purchase & inventory control salaries & wages; travel & trade relations; office supplies & postage; misc. G & A expense (dues & donations); EDP equipment or purchase service cost; telephone & telegraph; legal & professional fees; general taxes; general insurance; employee benefits.) | 13.49% |
| TOTAL OPERATING EXPENSES | 32.62% |
| NET OPERATING INCOME | 1.38% |
| TOTAL OTHER INCOME | 1.59% |
| TOTAL INCOME | 2.75% |
| TOTAL OTHER EXPENSES | 1.04% |
| NET PROFIT BEFORE MACHINE SHOP | 1.65% |
| NET PROFIT FROM SHOP OPERATIONS | .59% |
| NET PROFIT BEFORE TAXES | 1.99% |
| FEDERAL INCOME TAXES | .46% |
| NET PROFIT AFTER TAXES | 1.78% |

Source: 1985 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

# Quick Profile of the Median ASIA Wholesaler

## Figures Apply to 1984

| | |
|---|---|
| **SALES PERFORMANCE** | |
| Average Sales Volume | $1,405,605 |
| Percent Increase Over Previous Year | 4.67% |
| Cash Sales as Percent of Total Sales | 30.00% |
| **PROFITABILITY PERFORMANCE** | |
| Gross Profit Margin as Percent of Net Sales | 34.43% |
| Net Profit Before Taxes as Percent of Net Sales | 1.99% |
| Net Profit After Taxes as Percent of Net Sales | 1.78% |
| **ASSET MANAGEMENT** | |
| Average Inventory Turnover Rate | 2.94 (times) |
| Number of Days Average Inventory Carried | 124 Days |
| Days Credit Sales in Accounts Receivable | 42 Days |
| **FINANCIAL MANAGEMENT**[1] | |
| Net Worth to Total Indebtedness | 1.74 to 1 |
| Current Ratio | 3.42 to 1 |
| Accounts Receivable to Accounts Payable | 1.15 to 1 |
| **OPERATING EXPENSES** | |
| Total Operating Expenses to Net Sales | 32.62% |
| Total Payroll Expense as Percent of Net Sales | 18.53% |
| **PERSONNEL MEASUREMENTS** | |
| Sales Volume Per All Non-Shop Employees | $83,870 |
| Average Payroll Per All Non-Shop Employees | $15,840 |
| **MACHINE SHOP PERFORMANCE** | |
| Shop Sales Per Shop Employee | $26,370 |
| Average Wage or Salary Per Shop Employee | $17,520 |
| Gross Profit Margin as Percent of Shop Labor Sales | 38.32% |
| Shop Net Profits to Shop Labor Sales | 12.38% |

Source: 1985 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association. [1]These ratios relate dollars to dollars. In the ratio of accounts receivable to accounts payable, for instance, the median wholesaler had $1.15 of accounts receivable for every $1.00 of accounts payable.

# The Meaning of Median Figures

Readers will notice that a number of tables in this special section make use of median figures instead of, say, average figures. Many modern business analysts believe that medians are more precise than averages—hence a growing trend toward the use of medians.

The word "median," according to the dictionary, refers to the middle. In a statistical sampling, the word median refers to that firm whose figures place it in the exact middle of the sampling. In a study of the business costs of a thousand automotive wholesalers, for example, the median wholesaler would be that firm in the middle; five hundred of the firms would have higher costs and five hundred would have lower costs—in graduated figures working away from that median or middle firm.

# ASIA's Median Wholesaler: How Well He Managed His Assets

| | Median Wholesaler (1984) |
|---|---|
| Percent of Companies On LIFO | 30.40% |
| Change in Inventory During Year | 7.90% |
| Average Inventory Turnover Rate | 2.94 (Times) |
| Number of Days Average Inventory Carried | 124.3 (Days) |
| Turn and Earn Profitability Index | 103.53% |
| Cash Sales as a Percent of Total Sales | 30.00% |
| Days of Credit Sales in Accounts Receivable | 42.0 (Days) |
| Merchandise Gross Margin Return On Receivables | 306.90% |
| Ratio of Sales to Net Working Capital | 4.09 to 1 |
| Ratio of Sales to Assets (Total Asset Turnover) | 2.44 to 1[1] |

Source: 1985 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by Automotive Service Industry Association. [1]This ratio relates dollars to dollars. There were $2.44 of sales, for instance, to every $1.00 of assets.

# Balance Sheet of Median ASIA Wholesaler—1984

| | Median Wholesaler (1984) |
|---|---|
| ASSETS | |
| Cash and Marketable Securities | 8.83% |
| Accounts & Notes Receivable, Trade, Net | 19.45% |
| Inventory (End of Period) | 53.50% |
| All Other Current Assets | 2.30% |
| Total Current Assets | 83.78% |
| Net Fixed & All Other Non-Current Assets | 16.22% |
| Total Assets | 100.00% |
| LIABILITIES AND NET WORTH | |
| Accounts & Notes Payable, Trade | 18.80% |
| Other Notes Payable & Other Current Liabilities | 8.33% |
| Total Current Liabilities | 26.67% |
| Long Term Liabilities | 13.53% |
| Total Liabilities | 40.62% |
| Total Net Worth or Equity | 59.77% |
| Total Liabilities & Net Worth | 100.00% |

Source: 1985 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

# Leading Product Items As Reported by ASIA Jobbers

The following merchandise items proved to be "best sellers" for ASIA wholesalers during 1984. Each item contributed more than one percent to the average wholesaler's total sales volume.

1. Exhaust System Parts (all)
2. Filters & Cartridges (all)
3. Belts & Hoses (all)
4. Storage Batteries
5. Spark Plugs
6. Paint (all)
7. Shock Absorbers, Levelizers, Struts
8. Electronic Ignition Parts
9. Air Conditioners & Parts
10. Brake Shoes & Linings
11. Carburetors, Kits & Parts
12. Wire & Cable (all)
13. Brake Cylinders (Master & Wheel)
14. Starter Motors
15. Service Dealers Shop Equipment (all)
16. Gaskets (all)
17. Abrasives, Adhesives
18. Alterators, Generators, Parts
19. Motor Oil
20. Water Pumps & Parts
21. Ball Joints
22. Mechanical Ignition Parts
23. Anti-Freeze
24. Wiper Blades, Arms, Motors
25. Disc Brake Pads
26. Bearings (all except engine)
27. Disc Brake Calipers
28. Tie Rods & Ends
29. Sealed Beams
30. Fuel Pumps, Kits & Parts
31. Additives (all)
32. Disc Brake Rotors
33. Clutch Cover Assemblies
34. Universal Joints
35. Timing Gears, Chains, Sprockets
36. Transmission Parts & Kits

Source: 1985 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis,* published by the Automotive Service Industry Association.

# Number of Workers, by Category Of Median ASIA Wholesaler

| Job Classification | Average Number Employed |
|---|---|
| Outside Salesmen | 2.75 |
| Countermen | 6.00 |
| Deliverymen | 3.00 |
| Stockroom Employees | 2.00 |
| Executives | 2.00 |
| General & Administrative Clerical Employees | 3.00 |
| Non-Shop Employees | 16.00 |
| Shop Employees | 4.00 |

Source: 1985 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis,* published by the Automotive Service Industry Association.

# ASIA's Median Wholesaler: How His Profits Scored in 1984

| | Median Wholesaler (1984) |
|---|---|
| Gross Profit Margin as Percent of Net Sales | 34.43% |
| Net Profit (Before Taxes) as Percent of Net Sales | 1.99% |
| Net Profit (After Taxes) as Percent of Net Sales | 1.78% |
| Net Profit (Before Taxes) as Percent of Total Assets | 4.81% |
| Net Profit (After Taxes) as Percent of Total Assets | 4.51% |
| Net Profit (Before Taxes) as Percent of Net Worth | 7.89% |
| Net Profit (After Taxes) as Percent of Net Worth | 7.67% |
| Net Profit (Before Taxes) as Percent of Net Working Capital | 8.36% |
| Net Profit (After Taxes) as Percent of Net Working Capital | 9.40% |
| Shop Gross Profit as Percent of Shop Labor Sales | 38.32% |
| Shop Net Profit as Percent of Shop Labor Sales | 12.38% |

Source: 1985 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

# Automotive Wholesaler Failures

| Year | Number | Liabilities | Year | Number | Liabilities |
|---|---|---|---|---|---|
| 1946 | 1 | $ 47,000 | 1966 | 98 | $5,632,000 |
| 1947 | 17 | 456,000 | 1967 | 91 | 9,211,000 |
| 1948 | 26 | 892,000 | 1968 | 72 | 8,411,000 |
| 1949 | 44 | 1,150,000 | 1969 | 49 | 7,383,000 |
| 1950 | 55 | 1,083,000 | 1970 | 61 | 4,617,000 |
| 1951 | 23 | 330,000 | 1971 | 59 | 8,478,000 |
| 1952 | 22 | 529,000 | 1972 | 46 | 4,452,000 |
| 1953 | 28 | 1,010,000 | 1973 | 55 | 10,295,000 |
| 1954 | 39 | 1,015,000 | 1974 | 60 | 7,024,000 |
| 1955 | 53 | 1,523,000 | 1975 | 65 | 12,122,000 |
| 1956 | 41 | 2,699,000 | 1976 | 57 | 30,272,000 |
| 1957 | 45 | 1,470,000 | 1977 | 48 | 27,849,000 |
| 1958 | 42 | 1,275,000 | 1978 | 43 | 6,270,000 |
| 1959 | 50 | 1,744,000 | 1979 | 48 | 51,445,000 |
| 1960 | 77 | 4,191,000 | 1980 | 109 | 47,730,000 |
| 1961 | 89 | 3,744,000 | 1981 | 112 | 29,682,000 |
| 1962 | 80 | 4,696,000 | 1982 | 138 | 74,386,000 |
| 1963 | 74 | 3,917,000 | 1983 | 183 | 59,151,000 |
| 1964 | 94 | 3,452,000 | 1984 | 241 | 33,319,000 |
| 1965 | 84 | 4,488,000 | 1985 | 272 | 64,304,000[1] |

Source: Economic Analysis Dept., Dun & Bradstreet Corp. [1]Preliminary figures.

# Expense Item Statement For Median ASIA Jobber

| | Percent of Net Sales (1984) |
|---|---|
| Advertising and Sales Promotion | .72% |
| Salesmen's Salaries, Travel, etc. | 2.08% |
| Inside Countermen's Salaries & Commissions | 5.18% |
| Total Selling Expenses | 9.72% |
| Delivery Salaries (including bonuses) | .98% |
| Vehicle Operating Expense | .69% |
| Total Delivery Expenses | 2.53% |
| Stockroom Wages | .85% |
| Heat, Lights and Water | .88% |
| Rent (or depreciation) | 1.75% |
| Repairs & Maintenance (building) | .22% |
| Depreciation (store fixtures and equipment) | .38% |
| Total Store & Occupancy Expenses | 5.28% |
| Executive Salaries and Bonuses | 3.09% |
| Supervisory Salaries and Bonuses | 1.84% |
| Clerical Salaries and Wages | 1.64% |
| Purchasing & Inventory Control Salaries and Wages | none |
| Office Supplies and Postage | .44% |
| EDP Equipment and/or Purchase Service Cost | .75% |
| Telephone and Telegraph | .71% |
| Bad Debts less Recoveries | .21% |
| Legal and Professional Fees | .26% |
| Taxes, General | .53% |
| Taxes, Payroll | 1.59% |
| Insurance, General | .68% |
| Employee Benefits | 1.45% |
| Total General & Administrative Expenses | 13.49% |
| **TOTAL OPERATING EXPENSE** | **32.62%** |

Source: 1985 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis,* published by the Automotive Service Industry Association.

# Productivity Measures For Staff of ASIA Jobber

| | |
|---|---|
| Average Number of Non-Shop Employees | 16.0 |
| Merchandise Sales Per Non-Shop Employee | $83,870 |
| Merchandise Gross Margin Per Non-Shop Employee | $29,590 |
| Taxes & Benefits Per Non-Shop Employee | $ 2,540 |
| Total Payroll Expense as Percent of Merchandise Sales | 18.53% |
| Total Payroll Expense as Percent of Merchandise Gross Margin | 54.57% |
| Total Compensation as Percent of Merchandise Sales | 21.31% |
| Total Compensation To Merchandise Gross Margin | 62.76% |

Source: 1985 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis,* published by the Automotive Service Industry Association.

## ASIA Jobber's Operating Costs As Percent of Gross Margin

| | Median Wholesaler (1984) |
|---|---|
| Total Selling Expenses as Percent of Net Sales | 9.72% |
| Total Selling Expenses as Percent of Gross Margin | 30.25% |
| Total Delivery Expenses as Percent of Net Sales | 2.53% |
| Total Delivery Expenses as Percent of Gross Margin | 7.91% |
| Total Store & Occupancy Expenses as Percent of Net Sales | 5.28% |
| Total Store & Occupancy Expenses as Percent of Gross Margin | 15.66% |
| Total General & Administrative Expenses as Percent of Net Sales | 13.49% |
| Total General & Administrative Expenses as Percent of Gross Margin | 39.16% |

Source: 1985 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

## Key Business Ratios For ASIA's Median Wholesaler[1]

| | Median Wholesaler (1984) |
|---|---|
| Ratio of Net Worth to Total Indebtedness | 1.74 to 1 |
| Ratio of Total Assets to Net Worth | 1.57 to 1 |
| Ratio of Sales to Net Worth (Turnover of Net Worth) | 4.14 to 1 |
| Ratio of Current Assets to Current Debts | 3.42 to 1 |
| Ratio of Accounts Receivable to Accounts Payable | 1.15 to 1 |

Source: 1985 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association. [1]All these ratios relate dollars to dollars. In the ratio of sales to net worth, for instance, the median wholesaler had $4.09 of sales for every $1.00 of net worth.

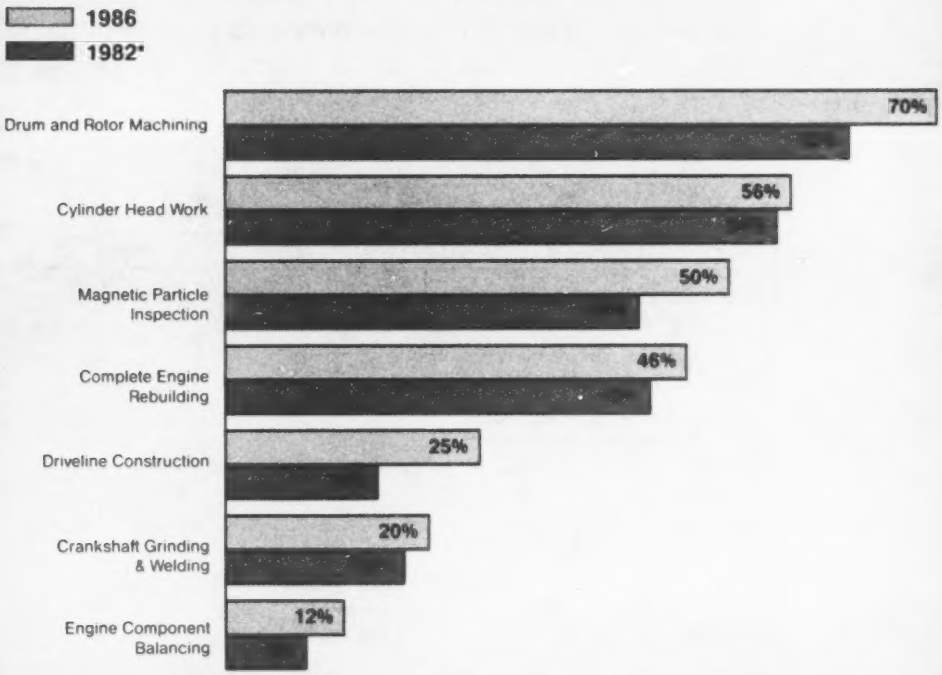
## Productivity Measures For Machine Shop of ASIA Jobber

| | Median Wholesaler (1984) |
|---|---|
| Average Number of Shop Employees | 4.0 |
| Shop Sales Per Shop Employee | $26,370 |
| Shop Gross Profit Margin Per Shop Employee | $ 9,730 |

Source: 1985 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

## Machine Shop Operations Performed By Jobbers in Their Own Shops

**Percent of Forum Survey Respondents**




Source: JOBBER TOPICS Forum Report—June, 1986. *Previous Forum Report.

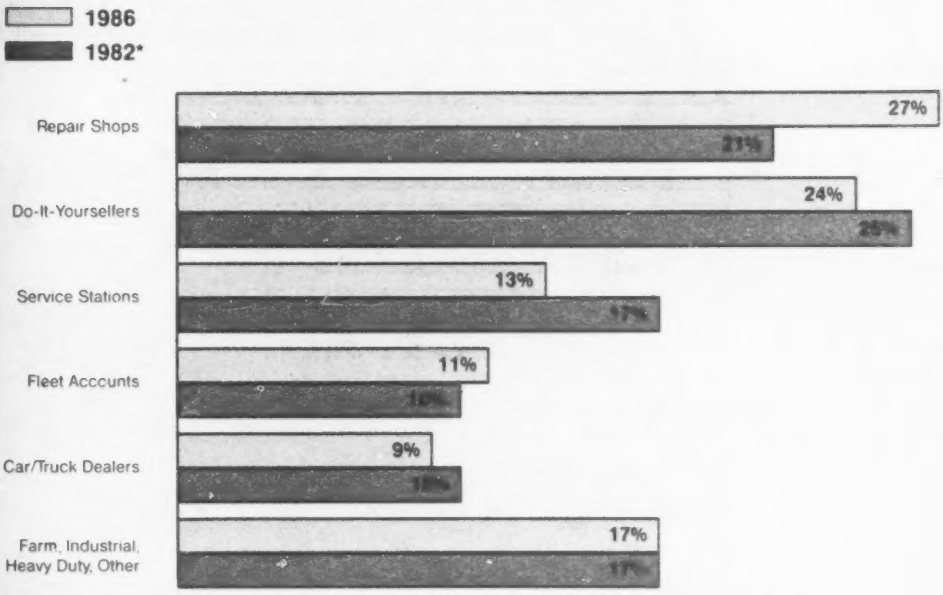
## ASIA Wholesaler's Shop Profit As Percent of Labor Sales—1984

| | Median Wholesaler (1984) |
|---|---|
| SALES—SHOP LABOR | 100.00% |
| Cost of Shop Labor Sales (Salaries, Wages & Bonuses) | 61.69% |
| GROSS PROFIT ON SHOP LABOR SALES | 38.32% |
| All Other Shop Expenses (Overhead, Depreciation, Repairs & Maintenance, Supplies, etc.) | 24.85% |
| NET PROFIT FROM SHOP OPERATIONS | 12.38% |

Source: 1985 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

## Jobber's Market For Machine Shop Service

Percent of Forum Survey Respondents




Source: JOBBER TOPICS Forum Report—June, 1986. *Previous Forum Report.

## Number of Lines, Part Numbers For Average and Median Jobber

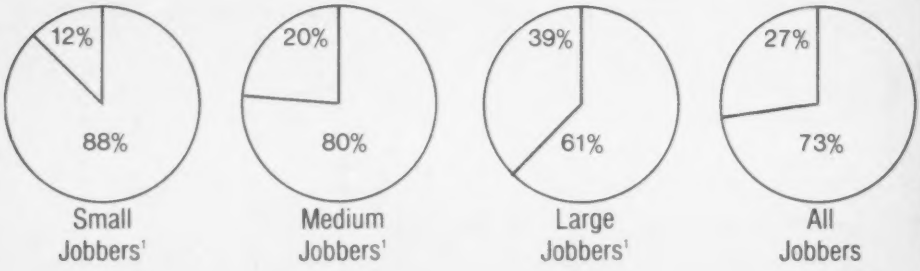
| | Small Jobber[1] | Medium Jobber[1] | Large Jobber[1] | All Jobbers |
|---|---|---|---|---|
| **Lines Carried** | | | | |
| Average Jobber | 64 | 82 | 125 | 99 |
| Median Jobber | 50 | 65 | 100 | 90 |
| **Part Numbers Carried** | | | | |
| Average Jobber | 9,240 | 20,102 | 34,801 | 26,851 |
| Median Jobber | 7,500 | 14,000 | 25,000 | 20,000 |

Source: JOBBER TOPICS Forum study on buying policies, published in May 1986 issue of this magazine. [1]Small Jobbers are those with sales under $350,000; Medium Jobbers have sales from $350,000 to $750,000; Large Jobbers have sales over $750,000.

## Where Jobbers Purchase Merchandise

☐ From WDS

☐ From Manufacturers




Source: JOBBER TOPICS Forum Study of September 1986. [1]In Forum Studies, Small Jobbers have annual sales volume under $350,000; Medium Jobbers have sales of $350,000 to $750,000; and Large Jobbers have sales over $750,000.

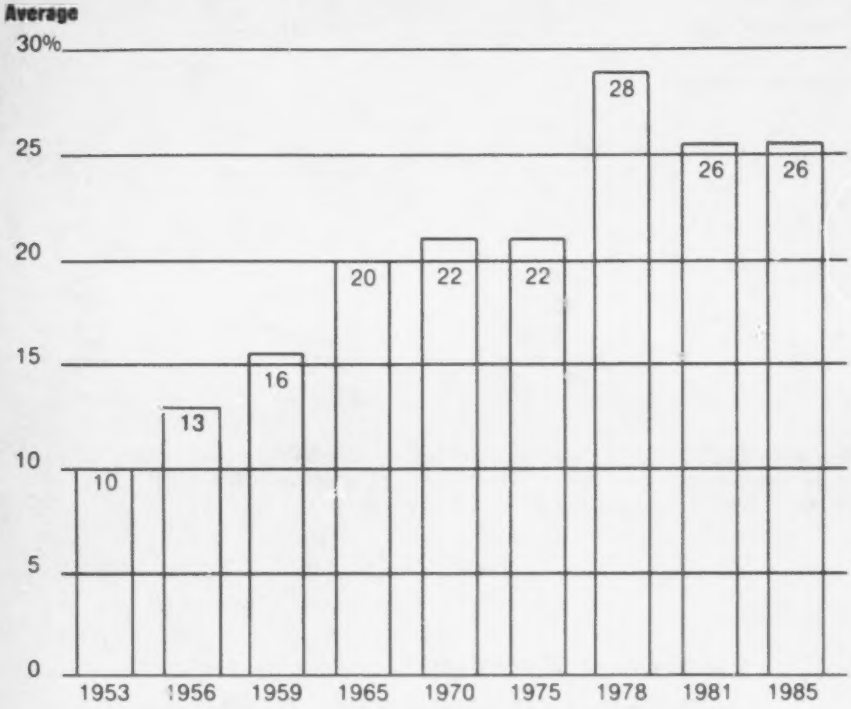
## Leading Product Groupings As Reported by ASIA Jobbers

The following product "families" or lines proved to be the "best sellers" for ASIA wholesalers during 1984. Lines are ranked according to the dollar volume of sales generated.

1. Ignition System Parts (all)
2. Brake System Parts (all)
3. Chassis, Steering, Suspension (all)
4. Starting, Generating, Electrical (all)
5. Paint, Body & Equipment (all)
6. Exhaust System Parts (all)
7. Accessories & Specialty Items
8. Filters & Cartridges
9. Engine Parts (Internal)
10. Belts and Hoses (all)
11. Chemicals
12. Fuel System Parts
13. Lighting System
14. Drive Train Components
15. Shop Equipment (Service Dealers)
16. Gaskets (all)
17. Motor Oil
18. Bearings (All Except Engine)
19. Seals (all)
20. Hand Tools
21. Tires & Tubes
22. Grease & Lubricants
23. Small Engines & Parts

Source: 1985 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

## Jobber Sales of Remanufactured Units Compared to Total Volume—1953-1985




Sources: JOBBER TOPICS Forum Studies for the indicated years.

## Average Miles Per Vehicle by Year

| | CARS | | BUSES | | | TRUCKS | | | |
|---|---|---|---|---|---|---|---|---|---|
| | Passenger Cars | Motorcycles | Commercial Buses | School Buses | All Buses | Single Unit Trucks | Truck Combinations | All Trucks | All Motor Vehicles |
| 1984 | 9,809 | 2,190 | — | — | 11,529 | 9,974 | 61,031 | 11,664 | 9,969 |
| 1983 | 9,641 | 2,149 | 32,795 | 6,532 | 11,521 | 9,705 | 52,424 | 11,178 | 9,732 |
| 1982 | 9,167 | 2,612 | 31,524 | 6,870 | 11,872 | 11,064 | 49,847 | 12,395 | 9,637 |
| 1981 | 9,002 | 2,573 | 32,996 | 6,780 | 11,953 | 11,028 | 47,023 | 12,340 | 9,484 |
| 1980 | 9,135 | 3,144 | 32,765 | 7,592 | 12,103 | 10,070 | 42,705 | 11,433 | 9,410 |
| 1979 | 9,485 | 4,000 | 29,691 | 7,179 | 11,732 | 9,184 | 49,664 | 10,810 | 9,580 |
| 1978 | 10,046 | 4,500 | 30,377 | 7,500 | 12,143 | 9,249 | 49,267 | 10,974 | 10,059 |

Source: U.S. Federal Highway Administration, *Highway Statistics*, Annual.

# MEMA's "Composite" Wholesaler

| ASSETS | 1984 | 1983 | 1982 |
|---|---|---|---|
| Cash | 6.5% | 7.1% | 8.1% |
| Accounts Receivable | 17.2% | 17.6% | 19.2% |
| Inventory | 46.2% | 46.7% | 44.7% |
| Total Current Assets | 69.9% | 71.4% | 72.0% |
| Deferred Assets | 30.1% | 28.6% | 28.0% |
| Total Assets | 100.0% | 100.0% | 100.0% |

| LIABILITIES & NET WORTH | | | |
|---|---|---|---|
| Current Debt | 43.4% | 38.0% | 36.7% |
| Long Term Debt | 12.6% | 18.4% | 16.3% |
| Net Worth | 44.0% | 43.6% | 47.0% |
| Total Debt & Net Worth | 100.0% | 100.0% | 100.0% |

| PROFIT & LOSS STATEMENT | 1984 | 1983 | 1982 |
|---|---|---|---|
| Net Sales | 100.0% | 100.0% | 100.0% |
| Cost of Goods Sold | 69.5% | 68.3% | 66.6% |
| Gross Profit | 30.5% | 31.7% | 33.4% |
| Expenses | 28.4% | 29.2% | 31.0% |
| Net Profit After Taxes | 2.1% | 2.5% | 2.4% |

| FINANCIAL RATIOS | 1984 | 1983 | 1982 |
|---|---|---|---|
| Collection Period—Days | 26.8 | 28.4 | 31.5 |
| Days Payables Outstanding | 45.2 | 40.6 | 41.4 |
| Quick Ratio | .54 | .65 | .74 |
| Current Ratio | 1.61 | 1.88 | 1.96 |
| Inventory to Working Capital | 174.7% | 140.0% | 126.7% |
| Inventory to Current Assets | 66.2% | 65.5% | 62.1% |
| Current Debt to Inventory | 93.9% | 81.3% | 82.1% |
| Current Debt to Net Worth | 98.8% | 87.0% | 78.0% |
| Total Debt to Net Worth | 126.8% | 128.3% | 112.1% |

| OPERATING RATIOS | | | |
|---|---|---|---|
| Gross Profit to Sales | 30.5% | 31.7% | 33.4% |
| Net Profit to Sales | 2.1% | 2.5% | 2.4% |
| Net Profit to Net Worth | 11.1% | 12.7% | 11.1% |
| Net Profit to Working Capital | 18.4% | 16.6% | 14.8% |
| Net Profit to Total Assets | 4.9% | 5.5% | 5.2% |

| EFFICIENCY RATIOS—TIMES | | | |
|---|---|---|---|
| Net Sales to Net Worth | 5.3 | 5.2 | 4.7 |
| Net Sales to Working Capital | 8.8 | 6.8 | 6.3 |
| Inventory Turnover | 3.5 | 3.3 | 3.3 |
| Net Sales to Total Assets | 2.3 | 2.3 | 2.2 |

Source: 1985 Edition of the *Automotive Distributor Trends & Financial Analysis*, published by the Motor & Equipment Manufacturers Association.

# Canadian Wholesalers Report Sales of $6.3 Billion in '85

| Year | Vehicle Registrations |
|---|---|
| 1963 | 6,074,655 |
| 1964 | 6,457,850 |
| 1965 | 6,698,778 |
| 1966 | 7,035,261 |
| 1967 | 7,495,203 |
| 1968 | 7,877,547 |
| 1969 | 8,254,160 |
| 1970 | 8,497,339 |
| 1971 | 9,022,136 |
| 1972 | 9,619,400 |
| 1973 | 10,295,000 |
| 1974 | 10,910,000 |
| 1975 | 11,444,643 |
| 1976 | 11,674,000 |
| 1977 | 12,421,000 |
| 1978 | 12,975,000 |
| 1979 | 13,225,000 |
| 1980 | 13,717,152 |
| 1981 | 13,851,482 |
| 1982 | 14,310,717 |
| 1983 | 14,620,648 |
| 1984 | 14,405,972 |

| Year | Automotive Jobber Sales |
|---|---|
| 1963 | $ 457,000,000 |
| 1964 | 462,262,000 |
| 1965 | 494,154,000 |
| 1966 | 524,400,000 |
| 1967 | 567,980,000 |
| 1968 | 702,886,000 |
| 1969 | 816,114,000 |
| 1970 | 865,681,000 |
| 1971 | 968,650,000 |
| 1972 | 1,721,114,000 |
| 1973 | 2,060,367,000 |
| 1974 | 2,529,207,000 |
| 1975 | 2,808,506,000 |
| 1976 | 3,197,059,000 |
| 1977 | 3,328,360,000 |
| 1978 | 3,572,951,000 |
| 1979 | 4,192,613,000 |
| 1980 | 4,787,964,000 |
| 1981 | 5,276,000,000 |
| 1982 | 5,208,500,000 |
| 1983 | 5,547,987,000 |
| 1984 | 6,100,000,000[1] |
| 1985 | 6,300,000,000[1] |

Source: Statistics Canada. [1]Automotive Jobber Sales figures for 1984 and 1985 were provided by the Automotive Industries Assn. of Canada.

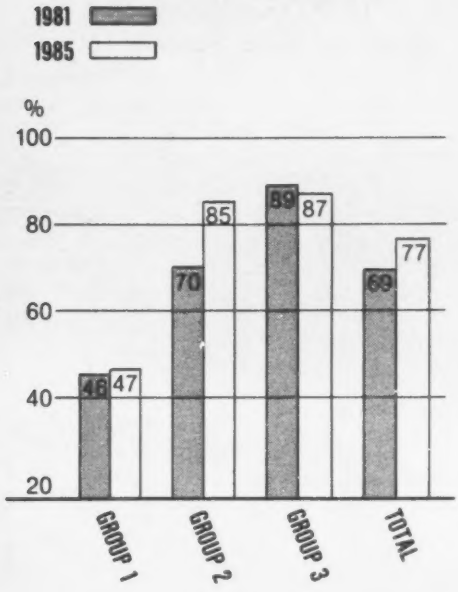
# ASE Testing and Certifying Of Mechanics (1972-1985)

| | |
|---|---|
| Total registered, excluding repeaters | 453,998 |
| Total actually taking tests, excluding repeaters | 383,397 |
| Total passing tests, including expired certifications | 327,664 |
| Total currently certified, excluding expired certifications (net) | 181,245 |
| —Total currently certified in either all auto or all truck areas | 39,032 |
| —Total currently certified in all auto and all truck areas | 1,533 |
| —Total currently certified in all auto and truck areas, plus body repair and painting and refinishing | 304 |
| Number of regular tests taken | 2,041,801 |
| Number of regular tests passed | 1,323,354 |
| Number of recertification tests passed | 288,932 |

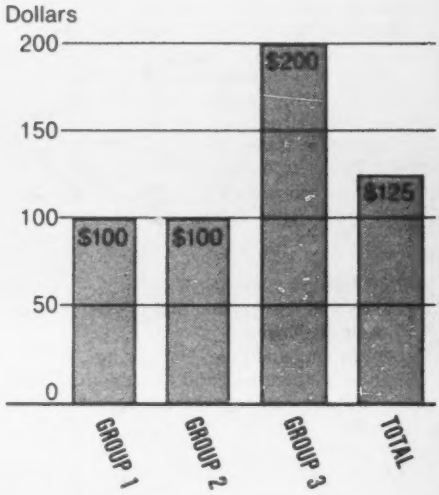
Source: The National Institute For Automotive Service Excellence.

# 1985 Jobber Clinic Study

**Percent holding clinics 1985 Compared to 1981**




**Median cost per clinic**




Source: JOBBER TOPICS Forum Report, May 1985. Group 1 (Under $350,000; Group 2 ($350,000 to $750,000); Group 3 ($750,000 and over).

# Shipments Of Passenger Car Tires

| Year | Original Equipment | Replacement | Export | Total |
|---|---|---|---|---|
| 1976 | 49,905,133 | 122,999,524 | 4,104,659 | 177,009,316 |
| 1977 | 55,667,960 | 129,283,293 | 4,600,816 | 189,552,114 |
| 1978 | 54,962,674 | 135,151,410 | 3,752,806 | 193,866,890 |
| 1979 | 48,188,000 | 121,922,000 | 3,909,000 | 174,019,000 |
| 1980 | 34,932,806 | 106,912,217 | 4,074,250 | 145,919,273 |
| 1981[1] | 35,979,000 | 125,263,000 | 4,017,000 | 165,259,000 |
| 1982 | 33,981,000 | 130,539,000 | 2,949,000 | 167,469,000 |
| 1983 | 43,845,000 | 133,964,000 | 4,206,000 | 182,015,000 |
| 1984 | 50,993,000 | 144,580,000 | 6,064,000 | 201,637,000 |
| 1985 | 54,838,000 | 141,455,000 | 4,625,000 | 200,918,000 |

Source: *Rubber Manufacturers Association.* [1]Figures have been adjusted to include those manufacturers, both foreign and domestic, that do not report to RMA. Since the 1982 and subsequent totals include Volkswagen. Jan. 2, 1983 and subsequent total includes Renault.

# PBE Wholesalers' Cost of Doing Business, as Reported by ASIA

## Median Figures—Based on 1983 Operations and Expressed as Percentage of Total Sales

| | |
|---|---|
| NET SALES (After Returns & Allowances) | 100.0% |
| Cost of Sales—Merchandise | 65.7% |
| Gross Margin of Profit—Merchandise | 34.3% |
| Total Operating Expenses (Selling, Delivery, Store, General & Administrative) | 31.8% |
| Net Operating Income | 2.4% |
| Total Other Income | 1.2% |
| Total Other Expenses | .8% |
| Net Profit Before Taxes | 2.5% |
| Federal Income Tax | .4% |
| Net Profit After Taxes | 2.1% |

| OPERATING EXPENSES | |
|---|---|
| Labor & Commissions (All payroll for executives, salesmen, and other employees) | 16.4% |
| Advertising and Sales Promotion | .4% |
| Vehicle Expense—Total (Includes delivery expenses, salesmen's cars, other company operated vehicles) | 1.6% |
| Freight | .2% |
| Donations | .1% |
| Professional Fees (Includes Legal, Accounting, etc.) | .3% |
| Bad Debts | .4% |
| Dues and Subscriptions | .1% |
| Interest | .8% |
| Depreciation (Vehicle equipment, store fixtures, etc.) | 1.5% |
| Travel and Entertainment (All company related) | .3% |
| Utilities (Heat, Lights, Water) | .4% |
| Telephone | .6% |
| Insurance (Includes group, life, vehicle, etc.) | 1.6% |
| Office and Store Expense (Supplies, light bulbs, etc.) | .5% |
| Rent | 1.4% |
| Repair and Maintenance (Building) | .3% |
| Data Processing Equipment (Leasing, purchase, service) | .6% |
| Taxes (General) | .4% |
| Taxes (Payroll—for all employees) | 1.3% |
| Employee Benefits (Includes profit sharing, pension fund, IRA, etc.) | .6% |
| Additional Expenses | .4% |
| TOTAL OPERATING EXPENSES | 31.8% |

Median Sales for all reporting PBE Wholesalers—$1,206,023
Inventory Turnover (Median) — 5.1 Turns
Number of Employees (including executives) — Full Time—9
Part Time—1.5

Source: 1984 Edition of Cost of Doing Business Study for ASIA PBE Wholesaler Division.

# MEMA's Profile of Average WD

| ASSETS | 1984 | 1983 | 1982 |
|---|---|---|---|
| Cash | 6.7% | 7.1% | 7.1% |
| Accounts Receivable | 28.9% | 28.9% | 30.1% |
| Inventory | 45.9% | 43.0% | 45.3% |
| Total Current Assets | 81.5% | 79.0% | 82.5% |
| Deferred Assets | 18.5% | 21.0% | 17.5% |
| Total Assets | 100.0% | 100.0% | 100.0% |
| **LIABILITIES & NET WORTH** | | | |
| Current Debt | 50.7% | 47.5% | 51.3% |
| Long Term Debt | 11.3% | 11.6% | 8.8% |
| Net Worth | 38.0% | 40.9% | 39.9% |
| Total Debt & Net Worth | 100.0% | 100.0% | 100.0% |
| **PROFIT & LOSS STATEMENT** | | | |
| Net Sales | 100.0% | 100.0% | 100.0% |
| Cost of Goods Sold | 77.0% | 78.1% | 77.8% |
| Gross Profit | 23.0% | 21.9% | 22.2% |
| Expenses | 21.1% | 20.1% | 20.4% |
| Net Profit After Taxes | 1.9% | 1.8% | 1.8% |
| **FINANCIAL RATIOS** | | | |
| Collection Period—Days | 40.1 | 41.9 | 42.4 |
| Days Payables Outstanding | 55.8 | 54.6 | 59.5 |
| Quick Ratio | .70 | .76 | .72 |
| Current Ratio | 1.61 | 1.66 | 1.61 |
| Inventory to Working Capital | 149.0% | 136.4% | 145.4% |
| Inventory to Current Assets | 56.3% | 54.4% | 54.9% |
| Current Debt to Inventory | 110.5% | 110.4% | 113.5% |
| Current Debt to Net Worth | 133.3% | 116.0% | 128.8% |
| Total Debt to Net Worth | 162.0% | 144.0% | 150.3% |
| **OPERATING RATIOS** | | | |
| Gross Profit to Sales | 23.0% | 21.9% | 22.2% |
| Net Profit to Sales | 1.9% | 1.8% | 1.8% |
| Net Profit to Net Worth | 13.4% | 10.9% | 11.4% |
| Net Profit to Working Capital | 16.6% | 14.1% | 14.7% |
| Net Profit to Total Assets | 5.1% | 4.5% | 4.6% |
| **EFFICIENCY RATIOS—TIMES** | | | |
| Net Sales to Net Worth | 6.9 | 6.2 | 6.5 |
| Net Sales to Working Capital | 8.5 | 8.0 | 8.3 |
| Inventory Turnover | 4.4 | 4.6 | 4.5 |
| Net Sales to Total Assets | 2.6 | 2.5 | 2.6 |

Source: 1985 Edition of the *Automotive Distributor Trends & Financial Analysis*, published by the Motor & Equipment Manufacturers Association.

# Operating Costs of Average WD As Percent of Net Sales: AWDA

## Figures Apply to 1985 Operating Experience

| | Percent of Net Sales |
|---|---|
| **SALES** | |
| Gross Sales, Merchandise | 132.94% |
| Returned Sales & Allowances, Merchandise | −27.68% |
| Cash Discounts Allowed | −1.91% |
| Trade or Volume Discounts Allowed | −3.35% |
| Total Reductions | −32.94% |
| NET SALES | 100.00% |
| **COST OF GOODS SOLD** | |
| Cost of Goods Sold | 76.24% |
| Factory Transportation & Handling Charge | .16% |
| Cash Discounts Earned | −1.25% |
| Lifo Cost (Benefit) | .08% |
| COST OF SALES | 75.23% |
| **GROSS MARGIN** | 24.77% |
| **OPERATING EXPENSES** | |
| Selling Expenses | 4.16% |
| (These include: salaries and/or commissions for supervisors, countermen, sales trainers; salesmen travel and trade relations costs; vehicle operation and depreciation, suppliers; advertising and sales promotion; WATS or leased line to customers.) | |
| Delivery and Shipping Expenses | 2.36% |
| (These include: salaries and/or wages for supervisors, drivers; drivers' travel costs; vehicle operation and depreciation; supplies; postage; transportation out.) | |
| Warehouse and Occupancy Expenses | 5.83% |
| (These include: salaries and/or wages for supervisors, warehouse employees, clerical workers; supplies; heat, light, water; rent; depreciation of buildings, land improvements, leasehold improvements, and warehouse fixtures and equipment; repairs and maintenance for buildings, fixtures and equipment.) | |
| General and Administrative Expenses | 8.58% |
| **TOTAL OPERATING EXPENSES** | 20.93% |
| **OPERATING INCOME** | 3.84% |
| **OTHER INCOME** | .82% |
| (This includes: cash discounts earned; interest received or accrued; gain on sales of assets; service bureau fees; rental income; dividends from subsidiaries; dividend income; other.) | |
| **OTHER EXPENSE** | 1.32% |
| (This includes: cash discounts allowed; interest paid or accrued; employees' profit sharing, employees' pension fund expenses.) | |
| **PRETAX INCOME** | 3.34% |

Source: 1986 *AWDA Financial Analysis Report* of the Automotive Warehouse Distributors Assn.

# Relative Size of State and Regional Wholesaler Associations

| 1985 Rank | Association | 1985 Regular Members | 1984 Rank | 1985 Rank | Association | 1985 Regular Members | 1984 Rank |
|---|---|---|---|---|---|---|---|
| 1 | Texas | 1,811 | 1 | 19 | Oregon | 280 | 21 |
| 2 | California | 1,247 | 2 | 20 | Chesapeake | 270 | 17 |
| 3 | Illinois | 888 | 3 | 21 | Tennessee | 248 | 19 |
| 4 | Florida | 830 | 4 | 22 | Iowa | 240 | 23 |
| 5 | New Jersey | 617 | 7 | 23 | Minnesota | 231 | 22 |
| 6 | Michigan | 600 | 6 | 24 | Wisconsin | 200 | 24 |
| 7 | Ohio | 590 | 5 | 25 | South Carolina | 181 | 20 |
| 8 | New England | 580 | 10 | 26 | New Mexico | 150 | 25 |
| 9 | Alabama | 525 | 10 | 27 | Arizona | 120 | 26 |
| 10 | Missouri/Kansas | 515 | 11 | 28 | Mississippi | 100 | 28 |
| 11 | Pennsylvania | 500 | 8 | 29 | Rocky Mountains | 90 | 27 |
| 11 | North Carolina | 500 | 10 | 29 | Arkansas | 90 | 28 |
| 12 | Washington | 483 | 9 | 30 | Nebraska | 78 | 29 |
| 13 | New York | 469 | 12 | 31 | Idaho | 69 | 65 |
| 14 | Oklahoma | 423 | 14 | 32 | North Dakota | 56 | 32 |
| 15 | Kentucky | 420 | 13 | 33 | West Virginia | 40 | 31 |
| 16 | Indiana | 360 | 15 | 34 | Montana | 32 | 33 |
| 16 | Louisiana | 360 | 16 | 35 | Nevada | 25 | 25 |
| 17 | Virginia | 301 | 17 | 36 | Hawaii | 5 | — |
| 18 | Georgia | 300 | 18 | | Total | 14,824 | |

Source: December 1985 issue of JOBBER TOPICS.

# AWDA Figures for WD Net Profit, Turnover, Sales Per Employee

| Company Size (By Dollar Vol.) | Average Net Sales Volume | Net Profit Before Taxes (Percent) | Days Sales Outstanding Accts. Rec. (Days) | Median Inventory Turns | Sales Per Employee (Dollars) |
|---|---|---|---|---|---|
| Under $4,000,000 | $ 2,579,727 | 1.24% | 46.44 | 2.84 | $144,280 |
| $4,000,000 to $7,000,000 | 5,359,612 | 2.11% | 44.22 | 3.07 | 166,138 |
| $7,000,000 to $10,000,000 | 7,983,402 | 2.07% | 50.06 | 3.74 | 162,661 |
| $10,000,000 to $15,000,000 | 11,987,165 | 2.68% | 50.15 | 3.92 | 183,094 |
| Over $15,000,000 | 30,485,839 | 4.21% | 50.65 | 4.16 | 189,306 |
| All Companies | 11,434,949 | 3.34% | 48.75 | 3.54 | 179,175 |

Source: 1986 *AWDA Financial Analysis Report* of the Automotive Warehouse Distributors Assn.

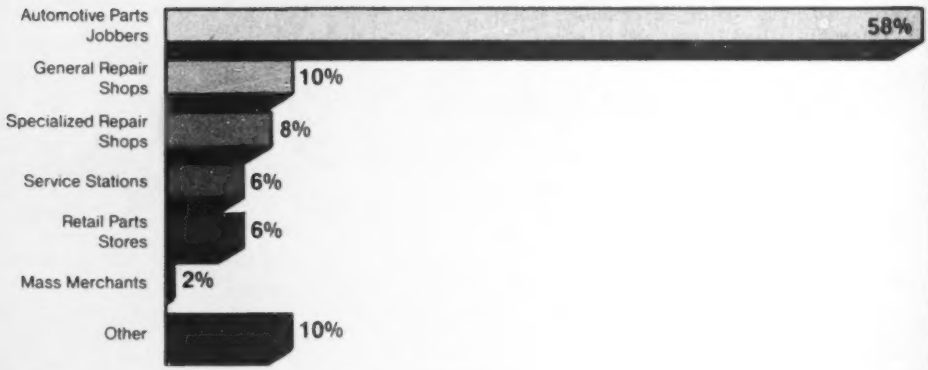
# Performance Measures For ASIA Warehouse Distributors

| | Median Distributor (1985) |
|---|---|
| **SALES PERFORMANCE** | |
| Dollars of Net Sales | $5,747.74 |
| Percent of Sales Change Over Prior Year | 2.22% |
| Number of Manufacturers Represented | 90.00 |
| Number of Product Lines Represented | 125.00 |
| **PROFITABILITY PERFORMANCE** | |
| Gross Margin to Net Sales | 24.49% |
| Net Operating Profit to Net Sales | 3.77% |
| Net Profit Before Taxes to Total Assets | 5.71% |
| Net Profit Before Taxes to Net Worth | 12.88% |
| Net Profit Before Taxes to Net Working Capital | 14.71% |
| **ASSET MANAGEMENT** | |
| Average Inventory Turnover Rate | 3.59 times |
| Days Sales in Accounts Receivable | 46.80 days |
| Sales to Net Working Capital | 4.88 to 1 |
| Total Asset Turnover | 2.27 to 1 |
| **FINANCIAL MANAGEMENT** | |
| Net Worth to Total Indebtedness | 103.05% |
| Total Assets to Net Worth | 1.97 to 1 |
| Turnover of Net Worth | 4.46 times |
| Current Assets to Current Liabilities | 2.40 to 1 |
| Cash Plus Marketable Securities Plus Trade Receivables to Current Debt | .91 to 1 |
| Accounts Receivable to Accounts Payable | 1.21 times |
| **OPERATING EXPENSE CONTROL** | |
| Total Operating Expense to Net Sales | 21.48% |
| Total Operating Expense to Gross Margin | 85.53% |
| Selling Expense to Net Sales | 3.77% |
| Delivery Expense to Net Sales | 2.19% |
| Warehouse & Occupancy Expense to Net Sales | 6.03% |
| General & Administrative Expense to Net Sales | 8.88% |
| **PERSONNEL PRODUCTIVITY** | |
| Net Sales Volume Per Employee | $ 183.95 |
| Gross Margin Per Employee | 44.31 |
| Net Sales Volume Per Outside Salesman | 1,952.26 |
| Total Payroll Expense as a Percent of Net Sales | 10.39% |
| Total Payroll Expense as a Percent of Gross Margin | 40.72% |

Source: 1985 Edition of the *Cost of Doing Business Analysis for ASIA Automotive Warehouse Distributors.* Some figures in the above table relate dollars to dollars. The figures for "Sales to Net Working Capital," for instance, can be interpreted to mean there were $4.88 sales for every dollar of working capital.

## Where the Average WD Sells, And How Much

**(Figures Show Portion of Annual Sales)**




*Other Accounts: Fleets, Heavy Duty, Industrial, PBE, Car Dealers.*

Source: JOBBER TOPICS Forum Survey for March 1986.

## Parts, Service Sales of Franchised New Car Dealerships: $33.6 Billion

**(Millions of Dollars)**

| | 1984 | 1985 | Percent Change |
|---|---|---|---|
| SERVICE LABOR SALES | | | |
| Customer Mechanical | $ 4,818 | $ 5,434 | 12.8 |
| Customer Body | 2,192 | 2,431 | 10.9 |
| Warranty | 1,848 | 2,174 | 17.6 |
| Sublet | 1,096 | 1,187 | 8.3 |
| Internal | 1,797 | 2,002 | 11.4 |
| Other | 994 | 1,073 | 7.9 |
| TOTAL SERVICE LABOR | 12,745 | 14,301 | 12.2 |
| PARTS SALES | | | |
| Customer Mechanical | $ 3,503 | $ 3,854 | 10.0 |
| Customer Body | 2,228 | 2,389 | 7.2 |
| Wholesale | 5,713 | 5,954 | 4.2 |
| Counter | 1,365 | 1,407 | 3.0 |
| Warranty | 2,318 | 2,640 | 13.9 |
| Internal | 1,869 | 2,023 | 8.3 |
| Other | 971 | 1,001 | 3.1 |
| TOTAL PARTS | 17,967 | 19,268 | 7.2 |
| TOTAL SERVICE & PARTS | 30,712 | 33,569 | 9.3 |

Source: National Automobile Dealers Assn., Industry Analysis Div.

# How ASIA's Heavy Duty Distributor Measured Up in Sales, Profits, Etc.

## Figures Apply to 1984

| | Median Distributor (1984) |
|---|---|
| **SALES PERFORMANCE MEASURES** | |
| Average Sales Volume (Merchandise Sales) | $2,940,120 |
| Percent of Sales Change Over Previous Year | (Up) 18.69% |
| Cash Sales as Percent of Total Merchandise Sales | 12.00% |
| **PROFITABILITY PERFORMANCE MEASURES** | |
| Gross Profit as a Percent of Net Merchandise Sales | 30.40% |
| Net Profit (Before Taxes) as a Percent of Net Merchandise Sales | 2.61% |
| Net Profit (After Taxes) as a Percent of Net Merchandise Sales | 1.76% |
| **ASSET MANAGEMENT MEASURES** | |
| Average Inventory Turnover Rate | 3.57 (Times) |
| Number of Days Average Inventory Carried | 102 (Days) |
| Overall Average Collection Period | 42 (Days) |
| **FINANCIAL MANAGEMENT MEASURES** | |
| Total Debt as a Percent of Net Worth | 134.61% |
| Ratio of Total Assets to Net Worth | 2.35 to 1[1] |
| Current Ratio (Assets to Liabilities) | 2.08 to 1 |
| **OPERATING EXPENSES** | |
| Total Non-Shop Operating Expense as a Percent of Net Merchandise Sales | 25.68% |
| Total Non-Shop Operating Expense as a Percent of Gross Profit From Merchandise Sales | 87.88% |
| **PERSONNEL MEASURES** | |
| Sales Volume Per Non-Shop Employee | $157,690 |
| Average Payroll Per Non-Shop Employee | $ 24,330 |
| **MACHINE SHOP PERFORMANCE** | |
| Shop Sales Per Shop Employee | $ 38,450 |
| Average Wage or Salary Per Shop Employee | $ 21,370 |
| Gross Profit as a Percent of Shop Labor Sales | 50.00% |
| Shop Net Profit as a Percent of Shop Labor Sales | 25.00% |

Source: 1985 Edition of *Management Performance Measurement for ASIA Heavy Duty Distributors*, published by the Automotive Service Industry Association. [1]Ratios relate dollars to dollars. In the ratio of total assets to net worth, for instance, there was $2.35 of total assets to every $1.00 of net worth.

# U.S. Battery Shipments by Year

| Year | Replacement | Original Equipment | Total Number |
|---|---|---|---|
| 1976 | 49,202,906 | 12,551,090 | 61,753,996 |
| 1977 | 54,600,707 | 14,717,697 | 69,318,404 |
| 1978 | 56,389,494 | 15,192,304 | 71,581,798 |
| 1979 | 53,746,314 | 14,389,748 | 68,136,062 |
| 1980 | 50,063,224 | 10,018,409 | 60,081,633 |
| 1981 | 53,597,906 | 10,005,102 | 63,603,008 |
| 1982 | 54,200,000 | 8,400,000 | 62,600,000 |
| 1983 | 56,104,752 | 10,822,900 | 66,927,652 |
| 1984 | 59,332,509 | 12,765,218 | 72,097,727 |
| 1985 | 58,683,589 | 13,466,528 | 72,150,117 |

Source: Battery Council International.

# Productivity of People Working For ASIA Heavy Duty Distributors

| Non-Shop Employees | Median Distributor (1984) |
|---|---|
| Parts & Merchandise Sales Per Non-Shop Employee | $157,690 |
| Parts & Merchandise Gross Profit Per Non-Shop Employee | $ 49,920 |
| Operating Expense Per Non-Shop Employee | $ 48,400 |
| Personnel Productivity Index: Gross Profit to Payroll | 2.20 to 1[1] |
| Parts & Merchandise Sales Per Outside Salesman | $841,320 |
| Parts & Merchandise Gross Profit Per Outside Salesman | $262,540 |
| **Shop Personnel** | |
| Machine Shop Sales Per Machine Shop Employee | $ 38,450 |
| Machine Shop Gross Profit Per Machine Shop Employee | $ 16,670 |

Source: 1985 Edition of *Management Performance Measurement for ASIA Heavy Duty Distributors*, published by the Automotive Service Industry Association. [1]Ratios relate dollars to dollars. In the Personnel Productivity Index, for example, there was $2.20 of gross profit for every $1.00 of payroll.

# What It Costs to Own, Operate Average Car in 1985

## Figures Based on Composite Costs*

### Cost Per Mile

| Cost Item | 1985 |
|---|---|
| Gasoline (unleaded) and oil | 5.57 cents |
| Tires | .65 cents |
| Maintenance | 1.20 cents |

### Fixed Costs Per Year

| | |
|---|---|
| Comprehensive insurance ($100 ded.) | $ 75.00 |
| $250 deductible collision insurance | 177.00 |
| Property damage and liability ($100/300/50M) | 213.00 |
| License, registration, taxes | 110.00 |
| Depreciation | 1,262.00 |
| Finance charge (20% down, 13.5% for 4 years) | 534.00 |
| TOTAL COST PER MILE | 23.2 cents |
| TOTAL COST PER YEAR | $3,484.00 |

Source: American Automobile Association. The AAA study used cars that were equipped with standard and optional accessories, automatic transmission, power steering, power disc brakes, AM/FM stereo, cruise control and rear window defogger. Gasoline costs were based on a $1.262 per-gallon charge for unleaded fuel. The study based insurance figures on personal, rather than business use of a vehicle. The cars were driven less than 10 miles to work. There were no youthful drivers. Depreciation costs were based on trade-in value at the end of four years or at 60,000 miles. *The costs for operating a Chevrolet Chevette, Celebrity and Impala were averaged to arrive at these figures.

# Latest Financial Rankings of

## Automobile Parts—Miscellaneous
## Figures Apply to 1984 With Certain Excepticns, As Noted

| RANK | COMPANY | REVENUES ($ MILL.) '84 AMT |
|---|---|---|
| 1 | Federal-Mogul Corp. | 895.50[1] |
| 2 | Echlin, Inc. | 771.40[1] |
| 3 | Sealed Power Corp. | 624.50[1] |
| 4 | Bearings, Inc. | 495.50 |
| 5 | Intermark, Inc. | 471.00 |
| 6 | Allen Group, Inc. | 399.20[1] |
| 7 | Standard Products Co. | 377.10 |
| 8 | Modine Manufacturing Co. | 302.70 |
| 9 | Douglas & Lomason Co. | 245.00 |
| 10 | Standard Motor | 238.70 |
| 11 | Haynes-Albion Corp. | 226.50[1] |
| 12 | Wynn's International, Inc. | 214.40 |
| 13 | Facet Enterprises, Inc. | 164.90[1] |
| 14 | Kysor Industrial Corp. | 159.90 |
| 15 | Trico Products Corp. | 142.00 |
| 16 | Simpson Industries, Inc. | 138.80 |
| 17 | Sparton Corp. | 137.70 |
| 18 | Twin Disc, Inc. | 133.30 |
| 19 | Lamson & Sessions Co. | 132.30[1] |
| 20 | Raymark Corp. | 129.20 |
| 21 | Superior Industries | 111.60 |
| 22 | Champion Parts | 111.20 |
| 23 | Republic Automotive | 109.50 |
| 24 | Arrow Automotive | 97.10 |
| 25 | Cascade Corp. | 84.10 |
| 26 | LSB Industries, Inc. | 75.90 |
| 27 | Hastings Manufacturing | 62.10 |
| 28 | Redlaw Industries, Inc. | 53.30 |
| 29 | Howell Industries, Inc. | 38.50[1] |
| 30 | Metex Corp. | 28.20 |
| 31 | Valley Forge Corp. | 17.80 |

| RANK | COMPANY | NET INCOME ($ MILL.) '84 AMT |
|---|---|---|
| 1 | Federal-Mogul Corp. | 52.00[1] |
| 2 | Echlin, Inc. | 45.60[1] |
| 3 | Sealed Power Corp. | 29.90[1] |
| 4 | Standard Products Co. | 22.70 |
| 5 | Modine Manufacturing Co. | 21.50 |
| 6 | Standard Motor | 19.90 |
| 7 | Allen Group, Inc. | 16.70[1] |
| 8 | Valley Forge Corp. | 12.40 |
| 9 | Bearings, Inc. | 11.00 |
| 10 | Wynn's International, Inc. | 10.20 |
| 11 | Kysor Industrial Corp. | 9.40 |
| 12 | Howell Industries, Inc. | 7.50[1] |
| 13 | Simpson Industries, Inc. | 7.40 |
| 14 | Twin Disc, Inc. | 6.10 |
| 15 | Hayes-Albion Corp. | 5.90[1] |
| 16 | Douglas & Lomason Co. | 5.80 |
| 17 | Cascade Corp. | 5.30 |
| 18 | Superior Industries | 4.40 |
| 19 | Trico Products Corp. | 4.20 |
| 20 | Hastings Manufacturing | 2.30 |
| 21 | Republic Automotive | 1.70 |
| 22 | Arrow Automotive | 1.60 |
| 22 | Metex Corp. | 1.60 |
| 24 | Lamson & Sessions Co. | 1.50 |
| 25 | Champion Parts | 1.30 |
| 26 | Facet Enterprises, Inc. | 0.70[1] |
| 27 | Redlaw Industries, Inc. | 0.40 |
| 28 | Intermark, Inc. | d2.00 |
| 29 | Raymark Corp. | d3.40 |
| 30 | Sparton Corp. | d4.40 |
| 33 | LSB Industries, Inc. | d6.40 |

## Automobile Parts—Major (1984)

| RANK | COMPANY | REVENUES ($ MILL.) '84 AMT |
|---|---|---|
| 1 | Dana Corp. | 3,575.20 |
| 2 | Eaton Corp. | 3,509.80 |
| 3 | Cummins Engine Co., Inc. | 2,325.80 |
| 4 | Genuine Parts Co. | 2,303.60 |
| 5 | Libbey-Owens-Ford Co. | 1,755.90 |
| 6 | Timken Co. | 1,149.90 |
| 7 | Sheller-Globe Corp. | 917.70[2] |
| 8 | Smith (A.O.) Corp. | 876.60 |
| 9 | Champion Spark Plug Co. | 816.50 |
| 10 | Arvin Industries, Inc. | 782.00 |
| 11 | Barnes Group, Inc. | 498.10 |
| 12 | Acklands Ltd. | 264.10 |
| 13 | Mr. Gasket Co. | 118.20 |
| 14 | Walbro Corp. | 70.30 |
| 15 | Cardis Corp. | 62.10 |

| RANK | COMPANY | NET INCOME ($ MILL.) '84 AMT |
|---|---|---|
| 1 | Eaton Corp. | 254.40 |
| 2 | Dana Corp. | 191.30 |
| 3 | Cummins Engine Co., Inc. | 187.90 |
| 4 | Genuine Parts Co. | 119.70 |
| 5 | Libbey-Owens-Ford Co. | 70.60 |
| 6 | Timken Co. | 46.10 |
| 7 | Sheller-Globe Corp. | 36.70[2] |
| 8 | Arvin Industries, Inc. | 30.20 |
| 9 | Champion Spark Plug Co. | 27.30 |
| 10 | Smith (A.O.) Corp. | 22.70 |
| 11 | Barnes Group, Inc. | 18.10 |
| 12 | Mr. Gasket Co. | 5.50 |
| 13 | Walbro Corp. | 3.70 |
| 14 | Acklands Ltd. | 3.00 |
| 15 | Cardis Corp. | 0.50 |

# Publicly-Owned Automotive Firms

## Automobile Parts—Miscellaneous

### Figures Apply to 1984 With Certain Exceptions, As Noted

| OPERATING PROFIT MARGIN (%) | | | RETURN ON CAPITAL (%) | | |
|---|---|---|---|---|---|
| RANK | COMPANY | '84 AMT | RANK | COMPANY | '84 AMT |
| 1 | Standard Motor | 15.00 | 1 | Howell Industries, Inc. | 43.19[1] |
| 2 | Modine Manufacturing Co. | 14.00 | 2 | Standard Products Co. | 18.14 |
| 3 | Sealed Power Corp. | 12.90 | 3 | Valley Forge Corp. | 16.56 |
| 4 | Federal-Mogul Corp. | 11.90 | 4 | Sealed Power Corp. | 15.02 |
| 4 | Kysor Industrial Corp. | 11.90 | 5 | Modine Manufacturing Co. | 14.76 |
| 6 | Cascade Corp. | 11.20 | 6 | Standard Motor | 14.74 |
| 7 | Echlin, Inc. | 10.80[1] | 7 | Kysor Industrial, Corp. | 13.06 |
| 7 | Valley Forge Corp. | 10.80 | 8 | Simpson Industries, Inc. | 12.30 |
| 9 | Standard Products Co. | 10.00 | 9 | Cascade Corp. | 11.70 |
| 10 | Metex Corp. | 9.64 | 10 | Douglas & Lomason Co. | 11.56 |
| 11 | Howell Industries, Inc. | 8.90[1] | 11 | Wynn's International, Inc. | 11.19 |
| 12 | Hastings Manufacturing | 8.40 | 12 | Echlin, Inc. | 10.69[1] |
| 13 | Simpson Industries, Inc. | 8.00 | 13 | Superior Industries | 10.30 |
| 14 | Twin Disc, Inc. | 7.20 | 14 | Hastings Manufacturing | 9.66 |
| 15 | Champion Parts | 6.70 | 15 | Federal-Mogul Corp. | 9.65 |
| 16 | Superior Industries | 6.60 | 16 | Hayes-Albion Cor. | 8.96[1] |
| 17 | Allen Group, Inc. | 6.50 | 17 | Allen Group, Inc. | 8.70 |
| 18 | Wynn's International, Inc. | 6.20 | 18 | Metex Corp. | 8.20 |
| 19 | Douglas & Lomason Co. | 5.40 | 19 | Twin Disc, Inc. | 7.29 |
| 20 | Intermark, Inc. | 5.20 | 20 | Bearings, Inc. | 6.00 |
| 21 | Bearings, Inc. | 5.00 | 21 | Trico Products Corp. | 4.86 |
| 22 | Hayes-Albion Corp. | 4.40[1] | 22 | Lamson & Sessions Co. | 3.28 |
| 23 | Republic Automotive | 3.80 | 23 | Arrow Automotive | 3.17 |
| 24 | Arrow Automotive | 3.50 | 24 | Republic Automotive | 3.02 |
| 25 | Lamson & Sessions Co. | 2.90 | 25 | Champion Parts | 2.57 |
| 26 | Redlaw Industries, Inc. | 2.60 | 26 | Redlaw Industries, Inc. | 2.34 |
| 27 | Raymark Corp. | 1.60 | 27 | Facet Enterprises, Inc. | .. |
| 28 | Facet Enterprises, Inc. | .. | 27 | Intermark, Inc. | .. |
| 28 | LSB Industries, Inc. | .. | 27 | LSB Industries, Inc. | .. |
| 28 | Sparton Corp. | .. | 27 | Raymark Corp. | .. |
| 28 | Trico Products Corp. | .. | 27 | Sparton Corp. | .. |
| | Average | 6.80 | | Average | 9.10 |

## Automobile Parts—Major (1984)

| OPERATING PROFIT MARGIN (%) | | | RETURN ON CAPITAL (%) | | |
|---|---|---|---|---|---|
| RANK | COMPANY | '84 AMT | RANK | COMPANY | '84 AMT |
| 1 | Cardis Corp. | 22.70 | 1 | Cummins Engine Co., Inc. | 17.95 |
| 2 | Mr. Gasket Co. | 13.50 | 2 | Genuine Parts Co. | 16.31 |
| 3 | Cummins Engine Co., Inc. | 12.60 | 3 | Eaton Corp. | 14.20 |
| 4 | Dana Corp. | 12.50 | 4 | Walbro Corp. | 12.51 |
| 5 | Eaton Corp. | 11.60 | 5 | Dana Corp. | 11.30 |
| 6 | Genuine Parts Co. | 10.20 | 6 | Arvin Industries, Inc. | 10.66 |
| 7 | Libbey-Owens-Ford Co. | 9.60 | 7 | Sheller-Globe Corp. | 10.26[2] |
| 8 | Walbro Corp. | 9.40 | 8 | Barnes Group, Inc. | 9.82 |
| 9 | Champion Spark Plug Co. | 9.20 | 9 | Libbey-Owens-Ford Co. | 9.40 |
| 10 | Barnes Group, Inc. | 8.60 | 10 | Smith (A.O.) Corp. | 8.64 |
| 11 | Arvin Industries, Inc. | 7.20 | 11 | Champion Spark Plug Co. | 6.71 |
| 11 | Sheller-Globe Corp. | 7.20[2] | 12 | Cardis Corp. | 4.89 |
| 13 | Smith (A.O.) Corp. | 5.90 | 13 | Timken Co. | 4.80 |
| 14 | Timken Co. | 4.80 | 14 | Mr. Gasket Co. | 4.74 |
| 15 | Acklands Ltd. | 3.00 | 15 | Acklands Ltd. | 4.22 |
| | Average | 9.90 | | Average | 9.80 |

Source: Moody's Industry Review, published by Moody's Investors Service. [1]1985. [2]Fiscal year ends 1/31.

# MEMA Members Forecast Sales Increase of 6.1% in 1986

| PRODUCT GROUP | Dollar Sales Forecast 1986 vs. 1985 % Change | Unit Sales Forecast 1986 vs. 1985 % Change |
|---|---|---|
| Accessories | + 7.1 | + 5.4 |
| Autobody Supplies & Equipment | + 7.2 | + 4.5 |
| Chassis Parts | + 5.1 | + 3.0 |
| Chemicals | + 9.4 | + 8.0 |
| Electrical Products | + 8.5 | + 6.0 |
| Engine Parts | + 4.9 | + 3.7 |
| Equipment | + 4.6 | 0.0 |
| Tools | + 9.2 | + 9.4 |
| Total Industry | + 6.1 | + 4.2 |
| % of Industry Forecasting Increased Sales | 82.5 | 75.0 |
| Average Increase | + 7.9 | + 6.9 |
| % of Industry Forecasting Decreased Sales | 12.5 | 19.2 |
| Average Decrease | − 4.6 | − 4.0 |
| % of Industry Forecasting No Change | 5.0 | 5.8 |
| ANNUAL SALES | | |
| Under $5,000,000 | + 9.2 | + 8.2 |
| $5,000,000 to $25,000,000 | + 4.4 | + 3.6 |
| $25,000,001 to $75,000,000 | + 7.6 | + 5.8 |
| Over $75,000,000 | + 5.9 | + 3.7 |

Source: Motor & Equipment Manufacturers Assn.

# Certified Mechanics By Type of Employer

| Employer | Number of Certified Technicians | Percent of Total Certified |
|---|---|---|
| Domestic Dealerships | 64,349 | 35.50 |
| Import Dealerships | 20,052 | 11.06 |
| Service Stations | 21,872 | 12.07 |
| Independent Garages | 20,700 | 11.42 |
| Specialty Shops | 6,380 | 3.52 |
| Tire Dealers | 10,235 | 5.65 |
| Mass Merchandisers | 3,039 | 1.68 |
| Fleets (private) | 7,229 | 3.99 |
| Other | 27,389 | 15.11 |
| TOTAL: | 181,245 | 100% |

Source: The National Institute For Automotive Service Excellence. Figures represent technicians currently certified through the fall of 1985 testing.

# Scrappage of Motor Vehicles

## (During One-Year Periods Ending June 30)

| | Passenger Cars | Trucks | Cars & Trucks |
|---|---|---|---|
| July 1, 1951 – June 30, 1952 | 3,137,989 | 531,835 | 3,669,824 |
| July 1, 1952 – June 30, 1953 | 2,465,936 | 615,932 | 3,081,868 |
| July 1, 1953 – June 30, 1954 | 3,491,000 | 780,513 | 4,271,513 |
| July 1, 1954 – June 30, 1955 | 3,247,436 | 467,659 | 3,715,095 |
| July 1, 1955 – June 30, 1956 | 4,312,759 | 596,257 | 4,909,016 |
| July 1, 1956 – June 30, 1957 | 4,309,153 | 630,303 | 4,939,456 |
| July 1, 1957 – June 30, 1958 | 4,221,607 | 502,245 | 4,723,852 |
| July 1, 1958 – June 30, 1959 | 2,981,641 | 372,085 | 3,353,726 |
| July 1, 1959 – June 30, 1960 | 4,348,719 | 690,568 | 5,039,287 |
| July 1, 1960 – June 30, 1961 | 4,294,118 | 646,791 | 4,940,909 |
| July 1, 1961 – June 30, 1962 | 4,360,774 | 575,903 | 4,936,677 |
| July 1, 1962 – June 30, 1963 | 4,741,017 | 720,039 | 5,461,056 |
| July 1, 1963 – June 30, 1964 | 5,319,286 | 779,870 | 6,099,156 |
| July 1, 1964 – June 30, 1965 | 5,704,373 | 735,975 | 6,440,348 |
| July 1, 1965 – June 30, 1966 | 6,173,512 | 1,073,593 | 7,247,105 |
| July 1, 1966 – June 30, 1967 | 6,984,214 | 946,649 | 7,930,863 |
| July 1, 1967 – June 30, 1968 | 6,200,017 | 860,542 | 7,060,559 |
| July 1, 1968 – June 30, 1969 | 6,348,488 | 966,003 | 7,314,491 |
| July 1, 1969 – June 30, 1970 | 7,460,984 | 837,173 | 8,298,157 |
| July 1, 1970 – June 30, 1971 | 6,021,041 | 1,043,877 | 7,064,918 |
| July 1, 1971 – June 30, 1972 | 7,058,029 | 1,048,031 | 8,106,060 |
| July 1, 1972 – June 30, 1973 | 7,987,384 | 1,207,536 | 9,194,920 |
| July 1, 1973 – June 30, 1974 | 7,193,679 | 1,047,207 | 8,240,886 |
| July 1, 1974 – June 30, 1975 | 5,668,708 | 907,699 | 6,576,407 |
| July 1, 1975 – June 30, 1976 | 6,828,903 | 1,097,457 | 7,926,360 |
| July 1, 1976 – June 30, 1977 | 8,233,925 | 1,667,653 | 9,901,578 |
| July 1, 1977 – June 30, 1978 | 7,907,075 | 1,426,294 | 9,333,369 |
| July 1, 1978 – June 30, 1979 | 9,312,274 | 1,916,142 | 11,228,416 |
| July 1, 1979 – June 30, 1980 | 8,404,993 | 1,731,670 | 10,136,663 |
| July 1, 1980 – June 30, 1981 | 7,542,480 | 1,518,546 | 9,061,026 |
| July 1, 1981 – June 30, 1982 | 6,921,273 | 1,458,795 | 8,380,068 |
| July 1, 1982 – June 30, 1983 | 6,242,544 | 1,490,971 | 7,733,515 |
| July 1, 1983 – June 30, 1984 | 6,674,928 | 1,601,889 | 8,276,817 |
| July 1, 1984 – June 30, 1985 | 7,728,594 | 2,100,120 | 9,828,714 |

Source: R. L. Polk & Co., Motor Statistical Division. Note: Adjustments for the absence of Oklahoma and other states have been made where applicable.

# U.S. Car Production:

| | 1985 Model Year | Pct. of Output | 1984 Model Year | Pct. of Output | Pct. of Change '85 vs. '84 |
|---|---|---|---|---|---|
| AMERICAN MOTORS | 111,138 | 1.36 | 192,196 | 2.47 | −1.11 |
| Renault Total | 111,138 | 1.36 | 192,196 | 2.47 | −1.11 |
| Alliance | 74,292 | 0.91 | 110,173 | 1.42 | −0.51 |
| Encore | 36,846 | 0.45 | 82,023 | 1.05 | −0.60 |
| CHRYSLER CORP. | 1,266,068 | 15.47 | 1,252,216 | 16.10 | −0.63 |
| Plymouth Total | 369,487 | 4.52 | 380,652 | 4.89 | −0.37 |
| Horizon | 142,611 | 1.74 | 159,247 | 2.04 | −0.30 |
| Reliant | 162,690 | 1.99 | 174,793 | 2.25 | −0.26 |
| Caravelle[1] | 49,006 | 0.60 | 25,348 | 0.33 | +0.27 |
| Gran Fury | 15,180 | 0.19 | 21,264 | 0.27 | −0.08 |
| Chrysler Total | 414,193 | 5.06 | 403,699 | 5.19 | −0.13 |
| LeBaron | 96,339 | 1.17 | 116,459 | 1.51 | −0.34 |
| LeBaron GTS | 95,187 | 1.16 | 10,589 | 0.15 | +0.01 |
| Laser | 52,209 | 0.64 | 70,066 | 0.90 | −0.26 |
| New Yorker/E-Class | 64,342 | 0.79 | 89,783 | 1.13 | −0.34 |
| Fifth Avenue | 106,116 | 1.30 | 116,802 | 1.50 | −0.20 |
| Dodge Total | 482,388 | 5.89 | 467,865 | 6.02 | −0.13 |
| Omni | 136,823 | 1.66 | 146,350 | 1.88 | −0.22 |
| Aries | 135,186 | 1.65 | 144,448 | 1.86 | −0.21 |
| Daytona | 47,746 | 0.58 | 52,974 | 0.68 | −0.10 |
| Dodge 600 | 66,835 | 0.82 | 74,704 | 0.96 | −0.14 |
| Lancer | 65,097 | 0.80 | 8,289 | 0.11 | +0.69 |
| Diplomat | 30,701 | 0.38 | 41,100 | 0.53 | −0.15 |
| FORD MOTOR CO. | 1,636,150 | 19.99 | 1,775,315 | 22.83 | −2.84 |
| Ford Division | 1,098,647 | 13.43 | 1,145,116 | 14.72 | −1.29 |
| Escort | 344,589 | 4.21 | 341,757 | 4.39 | −0.18 |
| Mustang | 187,776 | 2.29 | 140,338 | 1.80 | +0.49 |
| LTD | 184,431 | 2.26 | 225,933 | 2.90 | −0.64 |
| Taurus | 12,250 | 0.15 | 0.00 | 0.00 | +0.15 |
| Thunderbird | 170,513 | 2.08 | 146,186 | 1.88 | +0.20 |
| Crown Victoria | 7,122 | 0.09 | 83,081 | 1.07 | −0.98 |
| EXP | 3,842 | 0.05 | 42,501 | 0.55 | −0.50 |
| Tempo | 188,124 | 2.30 | 165,320 | 2.13 | +0.17 |
| L-M Division | 537,503 | 6.56 | 630,199 | 8.11 | −1.55 |
| Mercury Total | 374,426 | 4.57 | 461,495 | 5.94 | −1.37 |
| Lynx | 75,078 | 0.92 | 69,778 | 0.90 | +0.02 |
| Capri | 20,095 | 0.25 | 18,254 | 0.23 | +0.02 |
| Marquis | 84,862 | 1.04 | 121,049 | 1.56 | −0.52 |
| Sable | 5,810 | 0.07 | 0.00 | 0.00 | +0.07 |
| Cougar | 129,788 | 1.57 | 116,536 | 1.50 | +0.07 |
| Grand Marquis | 4,733 | 0.06 | 89,312 | 1.15 | −1.09 |
| Topaz | 54,060 | 0.66 | 46,566 | 0.60 | +0.06 |
| Lincoln Total | 163,077 | 1.99 | 168,704 | 2.17 | −0.18 |
| Continental | 25,259 | 0.31 | 36,105 | 0.46 | −0.15 |
| Lincoln | 119,787 | 1.46 | 106,998 | 1.38 | +0.08 |
| Mark VII | 18,031 | 0.22 | 25,601 | 0.33 | −0.11 |
| GENERAL MOTORS | 4,822,478 | 58.89 | 4,344,611 | 55.86 | +3.03 |
| Buick Total | 1,001,461 | 12.23 | 987,833 | 12.70 | −0.47 |
| Skylark | 40,953 | 0.50 | 110,649 | 1.42 | −0.92 |
| Skyhawk | 105,617 | 1.29 | 127,327 | 1.64 | −0.35 |
| Somerset Regal | 125,593 | 1.53 | 28,352 | 0.36 | +1.17 |

## 1984 Compared to 1985

| | 1985 Model Year | Pct. of Output | 1984 Model Year | Pct. of Output | Pct. of Change '85 vs. '84 |
|---|---|---|---|---|---|
| Century | 299,104 | 3.67 | 227,973 | 2.93 | +0.74 |
| Regal | 137,018 | 1.67 | 174,120 | 2.24 | −0.57 |
| LeSabre/Electra (rwd) | 96,652 | 1.18 | 178,500 | 2.30 | −1.12 |
| LaSabre (fwd) | 9,960 | 0.12 | 0.00 | 0.00 | +0.12 |
| Riviera | 47,882 | 0.58 | 53,093 | 0.68 | −0.10 |
| Electra (fwd) | 138,682 | 1.69 | 87,819 | 1.13 | +0.56 |
| Cadillac Total | 322,765 | 3.94 | 328,418 | 4.22 | −0.28 |
| Cimarron | 26,703 | 0.33 | 14,362 | 0.19 | +0.14 |
| Seville | 28,678 | 0.35 | 38,683 | 0.50 | −0.15 |
| Eldorado | 53,301 | 0.65 | 75,957 | 0.97 | −0.32 |
| Cadillac | 39,773 | 0.49 | 117,150 | 1.50 | −1.01 |
| DeVille (fwd) | 174,310 | 2.12 | 82,266 | 1.06 | +1.06 |
| Chevrolet Total | 1,627,767 | 19.87 | 1,457,066 | 18.73 | +1.14 |
| Chevette | 153,883 | 1.88 | 174,377 | 2.24 | −0.36 |
| Cavalier | 492,004 | 6.00 | 400,254 | 5.14 | +0.86 |
| Celebrity | 264,097 | 3.23 | 280,653 | 3.61 | −0.38 |
| Camaro | 214,429 | 2.62 | 230,082 | 2.96 | −0.34 |
| Citation | 28,697 | 0.35 | 104,045 | 1.34 | −0.99 |
| Monte Carlo | 138,532 | 1.69 | 97,922 | 1.26 | +0.43 |
| Chevrolet | 289,821 | 3.53 | 134,072 | 1.72 | +1.81 |
| Corvette | 46,304 | 0.57 | 35,661 | 0.46 | +0.11 |
| Oldsmobile Total | 1,168,982 | 14.28 | 1,065,528 | 13.70 | +0.58 |
| Omega | 0 | 0.00 | 29,288 | 0.38 | −0.38 |
| Firenza | 62,152 | 0.76 | 67,986 | 0.87 | −0.11 |
| Cutlass Supreme | 235,496 | 2.88 | 247,458 | 3.18 | −0.30 |
| Cutlass Ciera | 356,798 | 4.36 | 251,506 | 3.23 | +1.13 |
| 88/98 (rwd) | 168,940 | 2.06 | 282,378 | 3.63 | −1.57 |
| 88 (fwd) | 23,460 | 0.29 | 0.00 | 0.00 | +0.29 |
| Olds 98 | 143,277 | 1.75 | 109,321 | 1.41 | +0.34 |
| Calais | 149,829 | 1.83 | 33,195 | 0.43 | +1.40 |
| Toronado | 29,030 | 0.35 | 44,396 | 0.57 | −0.22 |
| Pontiac Total | 701,503 | 8.57 | 505,766 | 6.51 | +2.06 |
| Acadian[1] | 16,602 | 0.20 | 14,396 | 0.19 | +0.01 |
| 2000 Sunbird | 142,947 | 1.75 | 136,582 | 1.76 | −0.01 |
| 1000 | 24,895 | 0.30 | 25,063 | 0.32 | −0.02 |
| Firebird | 114,290 | 1.40 | 108,396 | 1.39 | +0.01 |
| Phoenix | 0 | 0.00 | 14,195 | 0.18 | −0.18 |
| 6000 | 58,952 | 0.72 | 106 | 0.00 | +0.72 |
| Grd. Prix/Bon'vle | 0 | 0.00 | 20,003 | 0.26 | −0.26 |
| Parisienne | 90,989 | 1.11 | 48,356 | 0.62 | +0.49 |
| Fiero | 109,569 | 1.34 | 114,002 | 1.47 | −0.13 |
| Grand Am | 143,259 | 1.75 | 24,667 | 0.32 | +1.43 |
| HONDA | 145,337 | 1.78 | 138,578 | 1.78 | +0.00 |
| NISSAN | 43,810 | 0.54 | 0 | 0.00 | +0.54 |
| NUMMI (Nova) | 64,601 | 0.79 | 20 | 0.00 | +0.79 |
| VOLKSWAGEN | 96,458 | 1.18 | 74,785 | 0.96 | +0.22 |
| Total U.S. Cars | 8,186,040 | 100.0 | 7,777,721 | 100.00 | |

Source: Reprinted by permission from *Automotive News*. Copyright 1986. [1]Built for sale in Canada only.

# *Imported New Car Sales In U.S. Since 1980*

| | 1985 | 1984 | 1983 | 1982 | 1981 | 1980 |
|---|---|---|---|---|---|---|
| Alfa Romeo | 4,502 | 3,702 | 3,002 | 2,194 | 2,301 | 3,000 |
| Audi | 74,061 | 71,237 | 47,936 | 45,954 | 50,817 | 42,483 |
| BMW | 87,873 | 70,897 | 59,242 | 52,393 | 41,761 | 37,071 |
| Capri | — | — | — | — | — | — |
| Challenger/Conquest | 2,716 | 3,725 | 14,024 | 14,128 | 12,690 | 12,924 |
| Chevrolet Spectrum | 53,968 | 2,007 | — | — | — | — |
| Chevrolet Sprint | 30,892 | 10,927 | — | — | — | — |
| Champ/Colt | 36,491 | 32,819 | 34,513 | — | 42,128 | 55,474 |
| Colt | 39,724 | 36,560 | 39,158 | 75,031 | 42,796 | 50,689 |
| DeLorean | — | — | — | 2,830 | 3,009 | — |
| Ferrari | N.A. | N.A. | N.A. | N.A. | N.A. | 779 |
| Fiat | N.A. | N.A. | 6,184 | 14,113 | 32,185 | 37,814 |
| Fiesta | — | — | — | — | 32,856 | 68,595 |
| Honda | 406,413 | 374,819 | 350,670 | 365,865 | 370,705 | 375,388 |
| Isuzu | 26,953 | 17,233 | 20,731 | 15,462 | 17,805 | — |
| Jaguar | 20,528 | 18,044 | 15,815 | 10,349 | 4,695 | 3,029 |
| Lancia | — | — | 637 | 1,174 | 1,068 | 2,100 |
| Maserati | 1,353 | 2,023 | — | — | — | — |
| Mazda | 211,093 | 169,666 | 173,388 | 163,150 | 166,105 | 161,623 |
| Mercedes-Benz | 88,903 | 79,222 | 73,692 | 65,963 | 63,059 | 53,790 |
| Merkur | 8,974 | — | — | — | — | — |
| MG | — | — | — | 3,712 | 13,370 | 26,025 |
| Mitsubishi | 49,734 | 39,104 | 32,755 | 3,950 | — | — |
| Nissan | 535,372 | 485,298 | 521,902 | 470,246 | 464,805 | 516,890 |
| Opel | — | — | — | — | — | — |
| Peugeot | 15,636 | 20,067 | 15,241 | 14,323 | 16,937 | 12,930 |
| Porsche | 25,173 | 20,024 | 21,831 | 14,407 | 11,241 | 10,490 |
| Renault | 7,205 | 12,243 | 33,229 | 37,540 | 30,869 | 25,365 |
| Rolls-Royce | 1,110 | 1,083 | 1,046 | N.A. | 1,158 | 942 |
| Rover | — | — | — | — | — | 481 |
| Saab | 39,068 | 33,631 | 26,323 | 18,463 | 14,613 | 13,558 |
| Sapporo/Conquest | 2,671 | 3,344 | 11,571 | 13,068 | 13,326 | 10,263 |
| Subaru | 178,175 | 157,385 | 156,840 | 150,335 | 152,062 | 142,968 |
| Toyota | 620,047 | 557,981 | 555,766 | 530,246 | 576,491 | 582,204 |
| Triumph | — | — | — | — | 9,768 | 14,939 |
| Vista | 23,593 | 15,270 | 4,303 | — | — | — |
| Volkswagen | 140,505 | 103,479 | 77,009 | 67,352 | 82,173 | 90,923 |
| Volvo | 104,267 | 99,541 | 88,857 | 72,352 | 64,477 | 56,999 |
| Yugo | 3,895 | — | — | — | — | — |
| TOTAL | 2,838,895 | 2,441,271 | 2,385,665 | 2,224,600 | 2,335,630 | 2,409,736 |

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# Annual Factory Sales of Motor Vehicles From U.S. Plants

| | Passenger Cars | Motor Trucks and Buses | Total Vehicles |
|---|---|---|---|
| 1985 | 8,002,259 | 3,356,905 | 11,359,164 |
| 1984 | 7,621,176 | 3,075,325 | 10,696,501 |
| 1983 | 6,739,223 | 2,413,897 | 9,153,120 |
| 1982 | 5,049,184 | 1,906,455 | 6,955,639 |
| 1981 | 6,255,340 | 1,700,908 | 7,956,248 |
| 1980 | 6,400,026 | 1,667,283 | 8,067,309 |
| 1979 | 8,419,226 | 3,036,706 | 11,455,932 |
| 1978 | 9,165,190 | 3,706,239 | 12,871,429 |
| 1977 | 9,200,849 | 3,441,521 | 12,642,370 |
| 1976 | 8,500,305 | 2,979,476 | 11,479,781 |
| 1975 | 6,712,852 | 2,272,160 | 8,985,012 |
| 1974 | 7,331,256 | 2,727,313 | 10,058,569 |
| 1973 | 9,657,647 | 2,979,688 | 12,637,335 |
| 1972 | 8,823,938 | 2,446,807 | 11,270,745 |
| 1971 | 8,584,592 | 2,053,146 | 10,637,738 |
| 1970 | 6,546,817 | 1,692,440 | 8,239,257 |
| 1969 | 8,223,715 | 1,923,179 | 10,146,894 |
| 1968 | 8,822,158 | 1,896,078 | 10,718,236 |
| 1967 | 7,436,764 | 1,539,462 | 8,976,226 |
| 1966 | 8,598,326 | 1,731,084 | 10,329,410 |
| 1965 | 9,305,561 | 1,751,805 | 11,057,366 |
| 1964 | 7,751,822 | 1,540,453 | 9,292,275 |
| 1963 | 7,637,728 | 1,462,708 | 9,100,436 |
| 1962 | 6,933,240 | 1,240,168 | 8,173,408 |
| 1961 | 5,542,707 | 1,133,804 | 6,676,511 |
| 1960 | 6,674,796 | 1,194,475 | 7,869,271 |
| 1959 | 5,591,243 | 1,137,386 | 6,728,629 |
| 1958 | 4,257,812 | 877,294 | 5,135,106 |
| 1955 | 7,920,186 | 1,249,106 | 9,169,292 |
| 1950 | 6,665,863 | 1,337,193 | 8,003,056 |
| 1945 | 69,532 | 655,683 | 725,215 |
| 1940 | 3,717,385 | 754,901 | 4,472,286 |
| 1935 | 3,273,874 | 697,367 | 3,971,241 |
| 1930 | 2,787,456 | 575,364 | 3,362,820 |
| 1925 | 3,735,171 | 530,659 | 4,265,830 |
| 1920 | 1,905,560 | 321,789 | 2,227,349 |
| 1915 | 895,930 | 74,000 | 969,930 |
| 1910 | 181,000 | 6,000 | 187,000 |
| 1905 | 24,250 | 750 | 25,000 |
| 1900 | 4,192 | — | 4,192 |

Source: Motor Vehicle Manufacturers Assn. of the U.S., Inc. and Ward's Automotive Reports.

# Car Output by Calendar Year—

## SUBCOMPACTS

| 1985 Position | 1985 Total | Make | 1984 Total | 1984 Position |
|---|---|---|---|---|
| 1 | 344,589 | Escort | 341,757 | 1 |
| 2 | 153,883 | Chevette | 174,337 | 2 |
| 3 | 145,337 | Accord | 138,578 | 5 |
| 4 | 142,611 | Horizon | 159,247 | 3 |
| 5 | 136,832 | Omni | 146,350 | 4 |
| 6 | 109,569 | Fiero | 114,002 | 6 |
| 7 | 96,458 | Golf/Rabbit | 74,785 | 9 |
| 8 | 75,078 | Lynx | 69,778 | 11 |
| 9 | 74,292 | Alliance | 110,173 | 7 |
| 10 | 64,601 | Nova (NUMMI) | 20 | 16 |
| 11 | 52,209 | Laser | 70,066 | 10 |
| 12 | 47,746 | Daytona | 52,974 | 12 |
| 13 | 43,810 | Sentra | — | |
| 14 | 36,846 | Encore | 82,023 | 8 |
| 15 | 24,895 | Pontiac 1000 | 25,063 | 14 |
| 16 | 16,602 | Acadian | 14,396 | 15 |
| 17 | 3,842 | EXP | 42,501 | 13 |
| | 1,569,191 | Total | 1,616,090 | |

## COMPACTS

| | | | | |
|---|---|---|---|---|
| | 492,004 | Cavalier | 400,254 | 1 |
| 2 | 214,429 | Camaro | 230,082 | 2 |
| 3 | 188,124 | Tempo | 165,320 | 4 |
| 4 | 187,776 | Mustang | 140,338 | 6 |
| 5 | 162,690 | Reliant | 174,793 | 3 |
| 6 | 142,947 | 2000 Sunbird | 136,582 | 7 |
| 7 | 135,186 | Aries | 144,448 | 5 |
| 8 | 114,290 | Firebird | 108,396 | 10 |
| 9 | 105,617 | Skyhawk | 127,327 | 8 |
| 10 | 96,339 | LeBaron | 116,459 | 9 |
| 11 | 62,152 | Firenza | 67,986 | 11 |
| 12 | 54,060 | Topaz | 46,566 | 12 |
| 13 | 26,703 | Cimarron | 14,362 | 14 |
| 14 | 20,095 | Capri | 18,254 | 13 |
| | 2,002,412 | Total | 1,891,167 | |

## INTERMEDIATES

| | | | | |
|---|---|---|---|---|
| 1 | 356,798 | Cutlass Ciera | 251,506 | 2 |
| 2 | 299,104 | Century | 227,973 | 4 |
| 3 | 264,097 | Celebrity | 280,653 | 1 |
| 4 | 235,496 | Cutlass Supreme | 247,458 | 3 |
| 5 | 184,431 | LTD | 225,993 | 5 |
| 6 | 170,513 | Thunderbird | 146,186 | 7 |
| 7 | 149,829 | Calais | 33,195 | 15 |
| 8 | 143,259 | Grand Am | 24,667 | 19 |
| 9 | 138,532 | Monte Carlo | 97,922 | 12 |
| 10 | 137,018 | Regal | 174,120 | 6 |
| 11 | 129,788 | Cougar | 116,536 | 9 |
| 12 | 125,593 | Somerset | 28,352 | 17 |
| 13 | 95,187 | LeBaron GTS | 10,589 | 22 |
| 14 | 90,989 | Pontiac 6000 E | 106 | 24 |

## According to Model Size and Rank

### INTERMEDIATES (CONT.)

| 1985 Position | 1985 Total | Make | 1984 Total | 1984 Position |
|---|---|---|---|---|
| 15 | 84,862 | Marquis | 121,049 | 8 |
| 16 | 66,835 | Dodge 600 | 74,704 | 14 |
| 17 | 65,097 | Lancer | 8,289 | 23 |
| 18 | 64,342 | N. Yorker/E Class | 89,783 | 13 |
| 19 | 49,006 | Caravelle | 25,348 | 18 |
| 20 | 40,953 | Skylark | 110,649 | 10 |
| 21 | 28,697 | Citation | 104,045 | 11 |
| 22 | 12,25( | Taurus | — | |
| 23 | 5,810 | Sable | — | |
| | — | Omega | 29,288 | 16 |
| | — | Grand Prix | 20,003 | 20 |
| | — | Phoenix | 14,195 | 21 |
| | 2,938,486 | Total | 2,462,549 | |

### STANDARDS

| | | | | |
|---|---|---|---|---|
| 1 | 289,821 | Chevrolet | 134,072 | 3 |
| 2 | 168,940 | Olds 88 (rwd) | 282,378 | 1 |
| 3 | 96,652 | LeSabre (rwd) | 178,500 | 2 |
| 4 | 58,952 | Parisienne | 48,356 | 6 |
| 5 | 30,701 | Diplomat | 41,100 | 7 |
| 6 | 23,460 | Olds 88 (fwd) | — | |
| 7 | 15,180 | Gran Fury | 21,264 | 8 |
| 8 | 9,960 | LeSabre (fwd) | — | |
| 9 | 7,122 | Crown Victoria | 83,081 | 5 |
| 10 | 4,733 | Grand Marquis | 89,312 | 4 |
| | 705,521 | Total | 878,063 | |

### LUXURY

| | | | | |
|---|---|---|---|---|
| 1 | 174,310 | Deville | 82,266 | 5 |
| 2 | 143,277 | Olds 98 (fwd) | 82,610 | 4 |
| 3 | 138,682 | Electra (fwd) | 61,580 | 7 |
| 4 | 119,787 | Lincoln | 106,998 | 2 |
| 5 | 106,116 | Fifth Avenue | 116,802 | 3 |
| 6 | 53,301 | Eldorado | 75,957 | 6 |
| 7 | 47,882 | Riviera | 53,093 | 8 |
| 8 | 46,304 | Corvette | 35,661 | 12 |
| 9 | 39,773 | Cadillac | 117,150 | 1 |
| 10 | 29,030 | Toronado | 44,396 | 9 |
| 11 | 28,678 | Seville | 38,683 | 10 |
| 12 | 25,259 | Continental | 36,105 | 11 |
| 13 | 18,031 | Mark VII | 25,601 | 15 |
| | — | Olds 98 (rwd) | 26,711 | 13 |
| | — | Electra (rwd) | 26,239 | 14 |
| | 970,430 | Total | 929,852 | |
| | 8,186,040 | GRAND TOTAL | 7,777,721 | |

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# United States Car Production By Model Year, 1959 to 1985

| Year | Cars | Year | Cars |
|---|---|---|---|
| 1985 | 7,975,390 | 1971 | 7,221,290 |
| 1984 | 8,102,269 | 1970 | 7,595,411 |
| 1983 | 5,768,893 | 1969 | 8,440,765 |
| 1982 | 5,447,135 | 1968 | 8,402,870 |
| 1981 | 6,639,954 | 1967 | 7,666,898 |
| 1980 | 7,085,480 | 1966 | 8,606,166 |
| 1979 | 9,526,024 | 1965 | 7,882,679 |
| 1978 | 8,995,418 | 1964 | 7,892,090 |
| 1977 | 9,159,100 | 1963 | 7,339,992 |
| 1976 | 8,114,376 | 1962 | 6,686,749 |
| 1975 | 6,523,880 | 1961 | 5,407,256 |
| 1974 | 8,125,488 | 1960 | 6,011,482 |
| 1973 | 9,915,802 | 1959 | 5,566,527 |
| 1972 | 8,589,049 | | |

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# Import Vehicle Penetration In Top Ten States

| State | Import Penetration 1980 | Import Penetration 1984 | Percent Change In Penetration | Percent Change In No. of Imports |
|---|---|---|---|---|
| Hawaii | 38.3% | 41.1% | 7.5% | 9.0% |
| Washington DC | 30.3 | 31.7 | 4.8 | – 8.3 |
| Oregon | 25.3 | 29.6 | 16.8 | 16.9 |
| California | 26.6 | 29.0 | 9.1 | 8.0 |
| Washington | 23.8 | 27.8 | 17.0 | 19.0 |
| New Hampshire | 21.3 | 25.1 | 17.7 | 46.7 |
| Connecticut | 20.4 | 24.2 | 18.6 | 19.5 |
| Maine | 17.0 | 22.6 | 33.5[1] | 49.2 |
| Alaska | 19.3 | 22.4 | 16.5 | 37.5 |
| Vermont | 17.3 | 22.2 | 28.3[1] | 40.0 |

Source: National Aftermarket Audit. [1]States whose import penetration increase is above the national average of 19.1 percent.

## United States Car Production By Calendar Year, 1959 to 1985

| Year | Cars | Year | Cars |
|---|---|---|---|
| 1985 | 8,186,040 | 1971 | 8,557,878 |
| 1984 | 7,777,721 | 1970 | 6,550,077 |
| 1983 | 7,112,352 | 1969 | 8,224,267 |
| 1982 | 4,973,870 | 1968 | 8,848,507 |
| 1981 | 6,280,045 | 1967 | 7,412,610 |
| 1980 | 6,416,885 | 1966 | 8,604,726 |
| 1979 | 8,418,369 | 1965 | 9,335,208 |
| 1978 | 9,153,299 | 1964 | 7,744,888 |
| 1977 | 9,293,674 | 1963 | 7,644,359 |
| 1976 | 8,537,759 | 1962 | 6,943,470 |
| 1975 | 6,740,584 | 1961 | 5,522,004 |
| 1974 | 7,309,763 | 1960 | 6,703,086 |
| 1973 | 9,667,118 | 1959 | 5,599,471 |
| 1972 | 8,827,706 | | |

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## 12 Leading Vehicle Producers— Worldwide, 1983 '84, '85

| | 1985 | 1984 | 1983 |
|---|---|---|---|
| 1. General Motors | 8,467,577 | 8,256,000 | 7,769,000 |
| 2. Ford Motor Co. | 5,550,500 | 5,584,651 | 4,934,231 |
| 3. Toyota | 3,540,646 | 3,429,249 | 3,182,614 |
| 4. Nissan | 2,500,088 | 2,481,686 | 2,462,436 |
| 5. Volkswagen | 2,389,000 | 2,148,000 | 2,060,992 |
| 6. Chrysler Corp. | 1,926,113 | 1,887,473 | 1,338,972 |
| 7. Renault | 1,674,549 | 2,362,300 | 2,780,816 |
| 8. Fiat | 1,631,054 | 1,409,000 | 1,441,870 |
| 9. Peugeot-Citroen | 1,626,000 | 1,634,000 | 1,737,012 |
| 10. Honda | 1,363,491 | 1,304,833 | 1,087,775 |
| 11. Mazda | 1,330,211 | 1,336,100 | 1,261,350 |
| 12. Mitsubishi | 1,236,351 | 1,165,500 | 1,018,403 |

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## Milestones in Production Of Motor Trucks and Buses[1]

| | |
|---|---|
| 10 millionth | 1938 |
| 25 millionth | 1953 |
| 50 millionth | 1971 |
| 75 millionth | 1979 |

Source: Motor Vehicle Manufacturers Association of the U.S., Inc. [1]Based on total U.S. factory sales data.

# United States Motor Truck Registrations by State

| State | Privately Owned[1] | | Privately and Publicly Owned[2] | |
|---|---|---|---|---|
| | 1983 | 1984 | 1983 | 1984 |
| Alabama | 842,135 | 904,819 | 864,316 | 927,109 |
| Alaska | 122,721 | 130,454 | 130,123 | 138,439 |
| Arizona | 637,901 | 589,431 | 650,709 | 602,631 |
| Arkansas | 491,070 | 507,476 | 500,358 | 517,154 |
| California | 3,628,313 | 3,661,292 | 3,797,926 | 3,835,287 |
| Colorado | 684,586 | 720,185 | 704,024 | 741,140 |
| Connecticut | 128,987 | 130,573 | 146,757 | 148,875 |
| Delaware | 81,124 | 89,837 | 82,996 | 91,763 |
| Florida | 1,556,650 | 1,696,800 | 1,661,268 | 1,807,402 |
| Georgia | 1,457,090 | 1,529,937 | 1,493,833 | 1,556,530 |
| Hawaii | 74,026 | 74,560 | 78,361 | 78,889 |
| Idaho | 327,478 | 371,161 | 345,348 | 390,460 |
| Illinois | 1,535,175 | 1,482,095 | 1,561,330 | 1,508,236 |
| Indiana | 954,632 | 971,185 | 981,326 | 998,605 |
| Iowa | 689,490 | 670,237 | 707,397 | 691,294 |
| Kansas | 618,799 | 645,231 | 635,216 | 661,605 |
| Kentucky | 770,090 | 773,685 | 799,057 | 808,863 |
| Louisiana | 817,588 | 874,241 | 833,200 | 890,307 |
| Maine | 190,740 | 202,411 | 201,370 | 213,271 |
| Maryland | 468,660 | 497,183 | 484,589 | 513,717 |
| Massachusetts | 427,126 | 429,262 | 453,880 | 456,150 |
| Michigan | 1,187,355 | 1,212,865 | 1,249,193 | 1,275,569 |
| Minnesota | 788,268 | 647,956 | 815,053 | 674,801 |
| Mississippi | 354,450 | 371,704 | 363,168 | 374,782 |
| Missouri | 867,604 | 901,908 | 881,966 | 916,115 |
| Montana | 330,427 | 266,086 | 340,742 | 277,401 |
| Nebraska | 406,941 | 409,571 | 415,269 | 423,804 |
| Nevada | 190,752 | 196,616 | 201,566 | 208,108 |
| New Hampshire | 106,164 | 117,982 | 114,187 | 126,102 |
| New Jersey | 439,059 | 407,584 | 512,743 | 478,741 |
| New Mexico | 419,498 | 428,264 | 434,369 | 444,339 |
| New York | 965,450 | 991,485 | 1,024,802 | 1,046,049 |
| North Carolina | 1,069,112 | 1,110,592 | 1,111,010 | 1,153,868 |
| North Dakota | 266,117 | 266,889 | 273,455 | 274,857 |
| Ohio | 1,264,057 | 1,292,846 | 1,307,834 | 1,338,229 |
| Oklahoma | 968,432 | 978,444 | 999,771 | 1,010,682 |
| Oregon | 600,895 | 593,023 | 632,784 | 618,512 |
| Pennsylvania | 1,033,970 | 1,203,137 | 1,078,324 | 1,248,704 |
| Rhode Island | 73,387 | 77,906 | 78,010 | 82,528 |
| South Carolina | 451,265 | 472,160 | 467,402 | 488,959 |
| South Dakota | 226,273 | 224,975 | 236,761 | 235,467 |
| Tennessee | 715,495 | 700,419 | 748,751 | 734,791 |
| Texas | 3,330,285 | 3,542,075 | 3,482,626 | 3,702,644 |
| Utah | 327,057 | 329,851 | 337,215 | 340,785 |
| Vermont | 79,701 | 84,195 | 83,578 | 88,105 |
| Virginia | 528,845 | 559,404 | 551,992 | 583,628 |
| Washington | 938,709 | 966,040 | 968,144 | 999,114 |
| West Virginia | 356,989 | 373,897 | 385,222 | 408,284 |
| Wisconsin | 622,368 | 663,057 | 654,067 | 695,534 |
| Wyoming | 202,419 | 193,653 | 209,523 | 200,996 |
| District of Columbia | 11,239 | 11,045 | 15,638 | 15,874 |
| TOTAL | 35,626,964 | 36,547,684 | 37,088,548 | 38,047,099 |

Source: U.S. Department of Transportation, Federal Highway Administration, Table MV-1. [1]Excludes farm trucks registered in certain states and restricted to use in vicinity of owner's farm. There were 61,611 such trucks in the 1984 count. [2]Includes federal, state, county and municipal vehicles; excludes vehicles owned by military services. Note: Registrations shown here are not synonymous with vehicles in use since the latter implies a count of vehicles in operation on a specific date or an average for a period of time, while registrations are a count of transactions (with transfers eliminated) during a specified period.

# Trailer, Truck Tractor and Light Truck Registration

Private and Commercial Trailers[1]

| State | Commercial Trailers[2] | Light Farm & Car Trailers | House Trailers[3] | Total Tractors | Truck Tractors[4] | Light Trucks[5] |
|---|---|---|---|---|---|---|
| Alabama | 48,261 | 40,556 | 49,008 | 137,825 | 31,255 | 808,548 |
| Alaska | 12,995 | 30,769 | 5,201 | 48,965 | 2,387 | 121,217 |
| Arizona | 42,499 | 115,424 | 64,071 | 221,994 | 7,167 | 563,528 |
| Arkansas | 36,631 | 206,955 | 14,037 | 257,623 | 15,823 | 450,487 |
| California | 462,606 | 614,087 | 402,025 | 1,478,718 | 63,740 | 2,879,030 |
| Colorado | 46,038 | 146,120 | 57,858 | 250,016 | 8,406 | 640,373 |
| Connecticut | 22,035 | 117,425 | — | 139,460 | 2,958 | 115,096 |
| Delaware | 13,555 | 24,105 | — | 37,660 | 4,914 | 76,271 |
| Florida | 97,966 | 671,073 | 622,477 | 1,391,516 | 67,082 | 1,485,971 |
| Georgia | 75,850 | 266,528 | 18,811 | 361,189 | 35,190 | 964,509 |
| Hawaii | 1,968 | 14,895 | — | 16,863 | 994 | 41,682 |
| Idaho | 10,689 | 53,696 | 20,285 | 84,670 | 8,537 | 323,034 |
| Illinois | 106,616 | 374,386 | 64,503 | 545,505 | 50,578 | 1,214,313 |
| Indiana | 72,990 | 205,635 | 55,125 | 333,750 | 47,086 | 757,160 |
| Iowa | 64,081 | 200,783 | 14,848 | 279,712 | 35,334 | 522,144 |
| Kansas | 71,074 | 20,529 | 16,150 | 107,753 | 18,757 | 529,707 |
| Kentucky | 40,340 | 26,404 | 24,486 | 91,230 | 19,284 | 683,173 |
| Louisiana | 192,043 | 195,928 | 14,981 | 402,952 | 16,291 | 812,908 |
| Maine | 355,396 | 81,270 | — | 436,666 | 4,748 | 181,320 |
| Maryland | 14,323 | 151,122 | — | 165,445 | 11,784 | 436,017 |
| Massachusetts | 23,352 | 193,784 | — | 217,136 | 11,676 | 376,124 |
| Michigan | 80,559 | 546,578 | 88,197 | 715,334 | 48,265 | 1,004,597 |
| Minnesota | 98,662 | 440,437 | 75,500 | 614,599 | 16,839 | 490,087 |
| Mississippi | 26,227 | 55,415 | 8,062 | 89,704 | 13,343 | 321,658 |
| Missouri | 57,338 | 344,347 | — | 398,685 | 27,531 | 787,495 |
| Montana | 3,948 | 64,466 | 28,720 | 97,134 | 2,721 | 221,894 |
| Nebraska | 38,876 | 132,711 | — | 171,587 | 18,539 | 310,019 |
| Nevada | 4,276 | 56,260 | 23,042 | 83,578 | 2,245 | 186,245 |
| New Hampshire | 7,416 | 81,418 | — | 88,834 | 3,149 | 102,962 |
| New Jersey | 55,768 | 252,067 | — | 307,835 | 26,491 | 339,753 |
| New Mexico | 37,010 | 38,027 | 47,760 | 122,797 | 11,286 | 398,492 |
| New York | 34,650 | 401,108 | — | 435,758 | 26,450 | 861,675 |
| North Carolina | 69,806 | 336,779 | 17,748 | 424,333 | 45,625 | 962,229 |
| North Dakota | 14,939 | 32,524 | 120 | 47,583 | 8,177 | 188,148 |
| Ohio | 104,552 | 274,835 | 110,849 | 490,236 | 40,676 | 1,109,252 |
| Oklahoma | 76,840 | 57,957 | 89,014 | 223,811 | 37,221 | 848,832 |
| Oregon | 45,678 | 167,326 | 120,706 | 333,710 | 14,890 | 497,992 |
| Pennsylvania | 75,301 | 264,472 | 128,879 | 468,652 | 36,364 | 962,640 |
| Rhode Island | 5,949 | 26,089 | — | 32,038 | 1,691 | 67,900 |
| South Carolina | 25,675 | 23,701 | 123 | 49,499 | 10,755 | 433,576 |
| South Dakota | 20,254 | 64,366 | 20,016 | 104,636 | 7,254 | 197,463 |
| Tennessee | 38,534 | 26,659 | 95 | 65,288 | 30,827 | 638,612 |
| Texas | 224,459 | 1,169,223 | — | 1,393,682 | 143,884 | 3,215,261 |
| Utah | 19,756 | 25,180 | 26,064 | 71,000 | 9,140 | 298,872 |
| Vermont | 1,748 | 41,136 | — | 42,884 | 1,101 | 75,986 |
| Virginia | 52,908 | 108,389 | 46,344 | 207,641 | 12,158 | 489,287 |
| Washington | 125,712 | 279,647 | 89,633 | 495,042 | 12,999 | 854,010 |
| West Virginia | 18,315 | 31,622 | 27,788 | 77,725 | 3,844 | 345,518 |
| Wisconsin | 55,355 | 2,416 | 31,446 | 89,217 | 18,928 | 567,985 |
| Wyoming | 9,087 | 63,847 | 20,103 | 93,037 | 3,837 | 155,466 |
| Dist. of Columbia | 178 | 1,892 | — | 2,070 | 115 | 10,010 |
| Total | 3,241,084 | 9,159,368 | 2,444,125 | 14,844,577 | 1,100,336 | 30,926,528 |

Source: U.S. Department of Transportation, Federal Highway Administration. Tables MV-9 and MV-11.
[1]The reporting of data on trailer registration varies greatly. Data are reported to the extent available. [2]Includes all commercial type trailers and semitrailers that are in private or for-hire use. [3]Mobile homes and house trailers are shown in this column for states which require them to be registered and are able to segregate them from other trailers. In states where this classification is not available, house trailers are included with light car trailers. [4]Data may include some large trucks used regularly in combination with full trailers. [5]Includes pickups, panels, and delivery vans generally of 10,000 pounds or less gross vehicle weight.

# U.S. Van and Light Truck Production 1984 vs. 1985

| | Total Output 1985 | Pct. of 1985 Output | Total Output 1984[1] | Pct. of 1984 Output |
|---|---|---|---|---|
| CHEVROLET | 1,325,491 | 39.72 | 968,709 | 34.07 |
| Chevy Van/Sportvan | 171,329 | 5.13 | 120,878 | 4.25 |
| S-10 | 250,194 | 7.50 | 199,631 | 7.02 |
| S-10 Blazer | 231,605 | 6.94 | 150,599 | 5.30 |
| Blazer | 40,011 | 1.20 | 46,919 | 1.65 |
| Astro | 90,104 | 2.70 | 7,895 | 0.28 |
| Suburban | 64,670 | 1.94 | 57,286 | 2.01 |
| Pickups | 430,600 | 12.90 | 332,404 | 11.69 |
| P Models | 46,978 | 1.41 | 53,097 | 1.87 |
| CHRYSLER | 213,930 | 6.41 | 213,115 | 7.49 |
| Ramcharger | 19,766 | 0.59 | 34,604 | 1.22 |
| Pickups | 194,164 | 5.82 | 169,951 | 5.97 |
| Rampage/Scamp | — | — | 8,560 | 0.30 |
| FORD | 1,148,279 | 34.40 | 1,116,834 | 39.28 |
| Bronco | 52,724 | 1.58 | 53,772 | 1.90 |
| Bronco II | 111,351 | 3.34 | 109,107 | 3.84 |
| Econoline/Club Wagon | 230,662 | 6.91 | 240,927 | 8.47 |
| Pickups | 439,512 | 13.16 | 465,512 | 16.37 |
| Ranger | 264,769 | 7.93 | 247,516 | 8.70 |
| Aerostar | 49,261 | 1.48 | — | — |
| GMC | 316,533 | 9.48 | 268,202 | 9.43 |
| Vandura/Rally Vans | 22,805 | 0.68 | 25,944 | 0.91 |
| S-15 | 57,740 | 1.73 | 51,732 | 1.82 |
| S-15 Jimmy | 51,582 | 1.55 | 41,720 | 1.47 |
| Jimmy | 11,525 | 0.35 | 9,278 | 0.33 |
| Safari | 34,481 | 1.03 | 2,124 | 0.07 |
| Caballero | 3,057 | 0.09 | 2,834 | 0.10 |
| Suburban | 23,850 | 0.71 | 26,065 | 0.92 |
| Pickups | 105,651 | 3.16 | 98,759 | 3.47 |
| P Models | 5,842 | 0.18 | 9,746 | 0.34 |
| AMC-JEEP | 225,914 | 6.77 | 176,276 | 6.20 |
| Cherokee | 120,328 | 3.61 | 93,326 | 3.28 |
| CJ | 46,553 | 1.39 | 45,363 | 1.60 |
| Pickups | 1,953 | 0.06 | 3,082 | 0.11 |
| Wagoneer | 10,021 | 0.30 | 11,944 | 0.42 |
| Grand Wagoneer | 17,814 | 0.53 | 20,019 | 0.70 |
| Comanche | 29,245 | 0.88 | — | — |
| Scrambler | — | — | 2,492 | 0.09 |
| NISSAN | 107,422 | 3.22 | 100,510 | 3.53 |
| Pickups | 107,422 | 3.22 | 100,510 | 3.53 |
| TOTAL | 3,337,569 | 100.00 | 2,843,646 | 100.00 |

Source: Reprinted by permission from *Automotive News*. Copyright 1986. [1]Note: 1984 figures revised to include only U.S. production.

# 1984 Motor Bus Registration

| State | Private and Commercial: Commercial Buses[1] | Private and Commercial: School and Other[2] | Publicly Owned: Federal | Publicly Owned: School[3] | Total School Buses | Total Buses |
|---|---|---|---|---|---|---|
| Alabama | 2,001 | 180 | 14 | 6,180 | 6,360 | 8,375 |
| Alaska | 271 | 488 | 54 | 281 | 769 | 1,794 |
| Arizona | 1,049 | 195 | 333 | 2,467 | 2,662 | 4,044 |
| Arkansas | 38 | 1,010 | 13 | 3,673 | 4,683 | 4,734 |
| California | 12,429 | 7,397 | 275 | 13,703 | 21,100 | 33,804 |
| Colorado | 746 | 842 | 38 | 4,022 | 4,864 | 5,648 |
| Connecticut | 2,212 | 6,435 | 19 | 643 | 7,078 | 9,309 |
| Delaware | 323 | 1,136 | — | 150 | 1,286 | 1,609 |
| Florida | 3,333 | 1,147 | 111 | 29,815 | 30,962 | 34,406 |
| Georgia | 1,115 | 2,314 | 69 | 10,080 | 12,394 | 13,578 |
| Hawaii | 2,506 | 659 | 18 | 651 | 1,310 | 3,834 |
| Idaho | 740 | 389 | 139 | 1,859 | 2,248 | 3,127 |
| Illinois | 5,298 | 11,795 | 54 | 3,304 | 15,099 | 20,451 |
| Indiana | 3,902 | 4,664 | 30 | 9,363 | 14,027 | 17,959 |
| Iowa | 1,047 | 294 | 7 | 6,443 | 6,737 | 7,791 |
| Kansas | 373 | 1,146 | 6 | 2,377 | 3,523 | 3,902 |
| Kentucky | 1,073 | 696 | 58 | 7,077 | 7,773 | 8,904 |
| Louisiana | 884 | 14,475 | 24 | 4,354 | 18,829 | 19,737 |
| Maine | 149 | 429 | 22 | 1,865 | 2,294 | 2,465 |
| Maryland | 3,093 | 3,516 | 93 | 3,967 | 7,483 | 10,669 |
| Massachusetts | 3,293 | 7,038 | 18 | 340 | 7,378 | 10,689 |
| Michigan | 2,364 | 6,185 | 30 | 13,008 | 19,193 | 21,587 |
| Minnesota | 2,307 | 3,998 | 35 | 10,317 | 14,315 | 16,657 |
| Mississippi | 821 | 2,135 | 62 | 4,895 | 7,030 | 7,913 |
| Missouri | 948 | 2,871 | 76 | 5,940 | 8,811 | 9,835 |
| Montana | 412 | 713 | 67 | 553 | 1,266 | 1,745 |
| Nebraska | 464 | 605 | 7 | 3,034 | 3,639 | 4,110 |
| Nevada | 1,314 | 148 | 90 | 110 | 258 | 1,662 |
| New Hampshire | 325 | 933 | 1 | 247 | 1,180 | 1,506 |
| New Jersey | 5,624 | 6,976 | 49 | 2,770 | 9,746 | 15,419 |
| New Mexico | 542 | 2,394 | 384 | 509 | 2,903 | 3,829 |
| New York | 11,868 | 7,224 | 94 | 13,631 | 20,855 | 32,817 |
| North Carolina | 1,878 | 7,227 | 41 | 22,103 | 29,330 | 31,249 |
| North Dakota | 97 | 481 | 28 | 1,305 | 1,786 | 1,911 |
| Ohio | 8,348 | 3,416 | 36 | 19,338 | 22,754 | 31,138 |
| Oklahoma | 369 | 1,409 | 124 | 9,846 | 11,255 | 11,748 |
| Oregon | 1,388 | 2,118 | 56 | 5,538 | 7,656 | 9,100 |
| Pennsylvania | 7,918 | 13,416 | 106 | 5,766 | 19,182 | 27,206 |
| Rhode Island | 313 | 1,219 | 5 | 3 | 1,222 | 1,540 |
| South Carolina | 876 | 3,331 | 17 | 8,363 | 11,694 | 12,587 |
| South Dakota | 302 | 412 | 42 | 1,288 | 1,700 | 2,044 |
| Tennessee | 1,709 | 1,309 | 43 | 8,494 | 9,803 | 11,555 |
| Texas | 3,005 | 11,645 | 180 | 36,992 | 48,637 | 51,822 |
| Utah | 316 | 75 | 54 | 702 | 777 | 1,147 |
| Vermont | 96 | 447 | 11 | 765 | 1,212 | 1,319 |
| Virginia | 2,157 | 243 | 123 | 10,865 | 11,108 | 13,388 |
| Washington | 736 | 2,033 | 183 | 8,061 | 10,094 | 11,013 |
| West Virginia | 843 | 59 | 23 | 2,504 | 2,563 | 3,429 |
| Wisconsin | 1,575 | 6,894 | 29 | 3,924 | 10,818 | 12,422 |
| Wyoming | 803 | 134 | 1 | 1,373 | 1,507 | 2,311 |
| District of Columbia | 2,264 | 33 | 261 | 275 | 308 | 2,833 |
| Total | 108,557 | 156,328 | 3,653 | 315,133 | 471,461 | 583,671 |

Source: U.S. Department of Transportation, Federal Highway Administration, Table MV-10.
[1]Includes municipally-owned transit buses. [2]In some instances, church, industrial and other private buses are included here; and in other instances, privately-owned school buses could not be segregated from commercial buses, and are included with the latter. [3]This column consists primarily of publicly-owned school buses but includes a few privately-owned school, institutional and industrial buses registered free or at a reduced rate.

# Profile of Establishments

| State | Establishments Having Machine Shops | Paint/ Body Supplies | Heavy Duty Parts/ Supplies | Tires/ Accessories |
|---|---|---|---|---|
| Ala. | 177 | 188 | 140 | 47 |
| Alaska | 4 | 16 | 15 | 2 |
| Ariz. | 127 | 85 | 84 | 30 |
| Ark. | 103 | 186 | 157 | 29 |
| Calif. | 848 | 407 | 576 | 173 |
| Colo. | 120 | 119 | 127 | 38 |
| Conn. | 119 | 119 | 90 | 40 |
| Del. | 27 | 25 | 17 | 6 |
| D. of C. | 1 | 3 | 2 | — |
| Fla. | 432 | 322 | 347 | 132 |
| Ga. | 211 | 277 | 200 | 52 |
| Hawaii | 21 | 35 | 22 | 10 |
| Idaho | 61 | 74 | 69 | 16 |
| Ill. | 575 | 501 | 336 | 136 |
| Ind. | 339 | 340 | 205 | 76 |
| Iowa | 209 | 321 | 215 | 78 |
| Kan. | 148 | 176 | 127 | 37 |
| Ky. | 158 | 221 | 135 | 57 |
| La. | 136 | 173 | 147 | 57 |
| Maine | 47 | 96 | 69 | 10 |
| Md. | 115 | 129 | 90 | 42 |
| Mass. | 229 | 246 | 153 | 63 |
| Mich. | 426 | 457 | 257 | 71 |
| Minn. | 207 | 269 | 159 | 50 |
| Miss. | 95 | 152 | 112 | 33 |
| Mo. | 273 | 347 | 242 | 94 |
| Mont. | 44 | 81 | 77 | 9 |
| Neb. | 102 | 141 | 76 | 30 |
| Nev. | 15 | 22 | 22 | 7 |
| N.H. | 48 | 75 | 41 | 14 |
| N.J. | 348 | 192 | 175 | 72 |
| N.M. | 50 | 70 | 68 | 19 |
| N.Y. | 549 | 540 | 439 | 213 |
| N.C. | 247 | 378 | 201 | 108 |
| N.D. | 46 | 64 | 53 | 15 |
| Ohio | 495 | 536 | 341 | 108 |
| Okla. | 131 | 147 | 133 | 41 |
| Ore. | 122 | 103 | 109 | 21 |
| Pa. | 460 | 623 | 371 | 160 |
| R.I. | 36 | 35 | 23 | 8 |
| S.C. | 124 | 155 | 97 | 35 |
| S.D. | 49 | 59 | 38 | 6 |
| Tenn. | 205 | 236 | 148 | 47 |
| Texas | 529 | 510 | 514 | 186 |
| Utah | 36 | 54 | 48 | 16 |
| Vt. | 26 | 63 | 28 | 10 |
| Va. | 136 | 236 | 166 | 81 |
| Wash. | 236 | 154 | 183 | 53 |
| W. Va. | 62 | 121 | 76 | 20 |
| Wis. | 268 | 303 | 156 | 60 |
| Wyo. | 28 | 45 | 35 | 7 |
| P.R. | 2 | 1 | 3 | 3 |
| TOTAL | 9,612 | 10,228 | 7,714 | 2,728 |

Source: Jobber Topics Circulation Files. Note: The sum of column totals exceed Jobber

## Influenced by JOBBER TOPICS

| Replacement Parts/ Supplies | Ignition/ Electrical | Equipment/ Tools | Import Car Parts/ Supplies | Retail Sales | State |
|---|---|---|---|---|---|
| 389 | 319 | 236 | 221 | 263 | Ala. |
| 32 | 29 | 24 | 23 | 25 | Alaska |
| 250 | 218 | 133 | 151 | 160 | Ariz. |
| 322 | 266 | 213 | 134 | 203 | Ark. |
| 1,647 | 1,385 | 896 | 1,058 | 1,232 | Calif. |
| 298 | 256 | 195 | 210 | 205 | Colo. |
| 270 | 233 | 168 | 191 | 199 | Conn. |
| 58 | 49 | 35 | 25 | 31 | Del. |
| 18 | 14 | 6 | 6 | 8 | D. of C. |
| 905 | 783 | 536 | 555 | 628 | Fla. |
| 546 | 447 | 312 | 254 | 335 | Ga. |
| 64 | 52 | 35 | 43 | 49 | Hawaii |
| 151 | 139 | 109 | 95 | 105 | Idaho |
| 1,038 | 892 | 633 | 640 | 555 | Ill. |
| 611 | 524 | 361 | 358 | 345 | Ind. |
| 551 | 489 | 367 | 339 | 284 | Iowa |
| 376 | 331 | 237 | 230 | 225 | Kan. |
| 395 | 322 | 229 | 165 | 191 | Ky. |
| 375 | 328 | 218 | 210 | 226 | La. |
| 163 | 142 | 90 | 100 | 96 | Maine |
| 306 | 248 | 181 | 162 | 186 | Md. |
| 512 | 406 | 275 | 288 | 298 | Mass. |
| 807 | 684 | 484 | 554 | 446 | Mich. |
| 385 | 327 | 260 | 224 | 206 | Minn. |
| 250 | 212 | 167 | 137 | 158 | Miss. |
| 682 | 589 | 451 | 403 | 405 | Mo. |
| 131 | 112 | 95 | 70 | 85 | Mont. |
| 233 | 207 | 161 | 125 | 120 | Neb. |
| 51 | 48 | 31 | 34 | 34 | Nev. |
| 112 | 99 | 67 | 73 | 84 | N.H. |
| 565 | 478 | 342 | 319 | 351 | N.J. |
| 138 | 127 | 94 | 100 | 98 | N.M. |
| 1,182 | 1,059 | 773 | 738 | 759 | N.Y. |
| 698 | 600 | 423 | 310 | 430 | N.C. |
| 105 | 92 | 86 | 72 | 59 | N.D. |
| 915 | 794 | 508 | 570 | 486 | Ohio |
| 332 | 287 | 235 | 173 | 193 | Okla. |
| 246 | 211 | 151 | 131 | 179 | Ore. |
| 1,116 | 931 | 651 | 582 | 637 | Pa. |
| 98 | 79 | 57 | 49 | 63 | R.I. |
| 295 | 273 | 188 | 164 | 219 | S.C. |
| 92 | 83 | 60 | 59 | 46 | S.D. |
| 441 | 369 | 252 | 203 | 312 | Tenn. |
| 1,426 | 1,196 | 799 | 818 | 815 | Texas |
| 126 | 106 | 84 | 76 | 79 | Utah |
| 77 | 63 | 46 | 45 | 53 | Vt. |
| 491 | 421 | 273 | 215 | 327 | Va. |
| 436 | 371 | 240 | 300 | 310 | Wash. |
| 152 | 130 | 95 | 71 | 89 | W. Va. |
| 499 | 435 | 318 | 327 | 258 | Wis. |
| 71 | 66 | 48 | 44 | 46 | Wyo. |
| 4 | 1 | 1 | 1 | 3 | P.R. |
| 21,433 | 18,322 | 12,929 | 12,445 | 13,199 | TOTAL |

Topics' total circulation due to multiple mentions.

# Yearly Statistics of International Show[1]

| Year | Place | Exhibitors | Booths | Net Square Ft. (Booth Space) | Attendance Total |
|---|---|---|---|---|---|
| 1933 | Chicago | 268 | 562 | 62,324 | 10,781 |
| 1934 | Cleveland | 336 | 798 | 72,261 | 13,348 |
| 1935 | Atlantic City | 350 | 850 | 92,400 | 12,761 |
| 1936 | Chicago | 357 | 915 | 98,632 | 13,476 |
| 1937 | Chicago | 380 | 1,012 | 110,095 | 13,045 |
| 1938 | Chicago | 355 | 947 | 103,412 | 15,526 |
| 1939 | Chicago | 351 | 961 | 108,413 | 13,366 |
| 1940 | Chicago | 352 | 969 | 117,331 | 12,925 |
| 1946 | Atlantic City | 430 | 1,169 | 126,888 | 13,712 |
| 1947 | Chicago | 486 | 1,327 | 171,978 | 19,888 |
| 1948 | Chicago | 520 | 1,444 | 178,510 | 19,534 |
| 1950 | Chicago | 522 | 1,385 | 172,463 | 17,067 |
| 1952 | Atlantic City | 460 | 1,275 | 143,148 | 14,049 |
| 1953[2] | Chicago | 289 | 440 | 44,000 | 4,288 |
| 1954[3] | Chicago | 478 | 984 | 111,978 | 12,880 |
| 1959 | Chicago | 459 | 1,004 | 118,404 | 21,614 |
| 1960 | New York | 487 | 1,143 | 119,066 | 34,087 |
| 1961 | Los Angeles | 511 | 1,157 | | 44,309[4] |
| 1962 | Chicago | 504 | 1,275 | 146,926 | 29,090 |
| 1963 | Philadelphia | 518 | 1,347 | 138,844 | 22,975 |
| 1964 | San Francisco | 579 | 1,415 | | 53,165[4] |
| 1965 | Chicago | 542 | 1,422 | 148,980 | 18,177 |
| 1966 | New York | 505 | 1,139 | 116,887 | 17,640 |
| 1967 | Chicago | 548 | 1,419 | 146,050 | 17,379 |
| 1968 | Las Vegas | 560 | 1,488 | | 19,512 |
| 1969 | Chicago | 516 | 1,403 | 145,220 | 18,449 |
| 1970 | Las Vegas | 576 | 1,514 | 136,780 | 21,157 |
| 1971 | Chicago | 496 | 1,407 | 140,700 | 18,989 |
| 1972 | Chicago | 526 | 1,444 | 158,000 | 20,226 |
| 1973 | Las Vegas | 559 | 1,579 | 157,900 | 25,190 |
| 1974 | Chicago | 510 | 1,523 | 157,450 | 17,219 |
| 1975 | Chicago | 542 | 1,523 | 157,550 | 20,824 |
| 1976 | San Francisco | 560 | 1,525 | 152,500 | 21,795 |
| 1977 | Chicago | 579 | 1,643 | 165,200 | 20,958 |
| 1978 | Chicago | 646 | [5] | 193,650 | 23,877 |
| 1979 | Las Vegas | 746 | 2,016 | 201,600 | 28,237 |
| 1980 | Chicago | 684 | [5] | 201,880 | 23,156 |
| 1981 | Chicago | 659 | [5] | 191,000 | 23,765 |
| 1982 | Las Vegas | 756 | 2,035 | 203,500 | 27,480 |
| 1983 | Chicago | 639 | 1,921 | 192,130 | 30,572 |
| 1984 | Chicago | 705 | [5] | 201,950 | 32,822[6] |
| 1985 | Las Vegas | 791 | 2,215 | 221,500 | 30,555 |
| 1986 | Chicago | 728 | [5] | 221,300 | 35,428 |

Sources: Hall-Erickson, Inc. and JOBBER TOPICS. [1]The exhibit is commonly called the Big "I" Show when staged in Chicago, but International Automotive Aftermarket Show when staged in Las Vegas or other western sites. [2]Indicates booth conference only. [3]Indicates trade show plus booth conference. [4]Attendance figures for 1961 and 1964 are "turnstyle" counts, not an actual badge count. For years 1962 through 1983 the figure is a badge count. [5]Show officials discontinued reporting the number of show booths fir the years indicated. [6]Attendance figure based on total registrations, not a badge count.

# Regional Automotive Show Statistics

## Eastern Automotive Aftermarket Show

| Year | Place | Exhibitors | Booths | Net Square Ft. (Booth Space) | Total Attendance |
|---|---|---|---|---|---|
| 1970 | Atlantic City | 243 | 498 | 49,800 | 10,571 |
| 1973 | Atlantic City | 362 | 730 | 73,850 | 13,957 |
| 1976 | Atlantic City | 417 | 819 | 83,600 | 15,615 |
| 1979 | Atlantic City | 556 | 960 | 119,200 | 16,043 |
| 1982 | Atlantic City | 589 | 12,115 | 121,150 | 17,266 |
| 1985 | Atlantic City | 626 | 14,135 | 141,350 | 28,589 |

## New England Automotive Show

| | | | | | |
|---|---|---|---|---|---|
| 1975 | Woburn, Mass. | 231 | 306 | 33,500 | 18,553 |
| 1978 | Woburn, Mass. | 265 | 365 | 65,000 | 17,685 |
| 1980 | Woburn, Mass. | 255 | 360 | 100,000 | 13,016 |
| 1984 | Woburn, Mass. | 253 | 400 | 40,000 | 13,773 |

## Pacific Automotive Show

| | | | | | |
|---|---|---|---|---|---|
| 1972 | San Francisco | 282 | 531 | 53,100 | 9,459 |
| 1973[1] | Las Vegas | 559 | 1,579 | 157,900 | 25,190 |
| 1974 | Los Angeles | 332 | 680 | 68,000 | 10,071 |
| 1975 | Anaheim | 301 | 550 | 55,000 | 10,226 |
| 1976[1] | San Francisco | 560 | 1,525 | 152,500 | 21,795 |
| 1977 | Las Vegas | 323 | 670 | 67,000 | 8,998 |
| 1978 | San Francisco | 311 | 661 | 66,100 | 9,061 |
| 1979[1] | Las Vegas | 746 | 2,016 | 201,600 | 28,237 |
| 1980 | Anaheim | 341 | 742 | 74,200 | 11,086 |
| 1981 | San Francisco | 322 | 696 | 69,600 | 9,069 |
| 1982[1] | Las Vegas | 756 | 2,035 | 203,500 | 27,480 |
| 1983 | Reno | 325 | 665 | 66,500 | 9,264 |
| 1984 | Anaheim | 305 | 665 | 66,500 | 11,705 |
| 1985[1] | Las Vegas | 791 | 2,215 | 221,500 | 30,555 |
| 1986 | Reno | 360 | 780 | 78,000 | 11,530 |

Sources: Hall-Erickson, Inc. (producer of the Eastern Show); New England Regional Automotive Show and the Pacific Automotive Show. [1]The 1973, 1976, 1979 1982 and 1985 figures relate to PAS-IASI Shows, which involve greater participation by exhibitors and visitors.

# Milestones in Production Of Cars[1]

| Units | Year |
|---|---|
| 1 millionth | 1912 |
| 10 millionth | 1920 |
| 50 millionth | 1935 |
| 100 millionth | 1952 |
| 150 millionth | 1960 |
| 200 millionth | 1967 |
| 250 millionth | 1972 |
| 300 millionth | 1979 |

Source: Motor Vehicle Manufacturers Association of the U.S., Inc. [1]Based on total U.S. factory sales data.

# U.S.-Canadian Trade in Automotive Products, 1984-85

| CANADA IMPORTS FROM U.S. | YTD 1984 (Canadian $000,000) | YTD 1985 | Percent Change |
|---|---|---|---|
| Passenger Autos | $ 6,085.2 | $ 8,565.9 | 40.8 |
| Trucks | 1,829.0 | 2,385.3 | 30.4 |
| Other Vehicles | 318.3 | 286.3 | −10.1 |
| Assembled Vehicles | 8,232.5 | 11,237.5 | 36.5 |
| Engines | 1,281.2 | 1,598.3 | 24.8 |
| Engine Parts | 885.7 | 913.2 | 3.1 |
| Parts & Accessories | 12,213.9 | 13,792.6 | 12.9 |
| All Motor Vehicle Parts | 14,380.8 | 16,304.1 | 13.4 |
| All Automotive Imports | 22,613.3 | 27,541.6 | 21.8 |
| U.S. IMPORTS FROM CANADA | | | |
| Passenger Autos | 13,552.5 | 15,968.9 | 17.8 |
| Trucks | 5,333.7 | 5,745.2 | 7.7 |
| Other Vehicles | 276.3 | 263.7 | − 4.6 |
| Assembled Vehicles | 19,162.5 | 21,977.8 | 14.7 |
| Engines & Engine Parts | 2,085.2 | 1,981.2 | − 5.0 |
| Parts & Accessories | 7,397.7 | 8,642.1 | 16.8 |
| All Motor Vehicle Parts | 9,482.9 | 10,623.3 | 12.0 |
| All Automotive Exports | 28,645.4 | 32,601.1 | 13.8 |
| BALANCES | | | |
| Passenger Autos | 7,467.3 | 7,403.0 | |
| Trucks | 3,504.7 | 3,359.9 | |
| Other Vehicles | −42.0 | −22.6 | |
| Assembled Vehicles | 10,930.0 | 10,740.3 | |
| Engines & Engine Parts | −81.7 | −530.3 | |
| Parts & Accessories | −4,816.2 | −5,150.5 | |
| All Motor Vehicle Parts | −4,897.9 | −5,680.8 | |
| All Automotive Trade | 6,032.1 | 5,059.5 | |

Source: Statistics Canada.

# Vehicle Production Milestones[1]

## (Cars, Trucks & Buses Combined)

| Units | Year |
|---|---|
| 100 millionth | 1948 |
| 150 millionth | 1955 |
| 200 millionth | 1962 |
| 250 millionth | 1968 |
| 300 millionth | 1972 |
| 400 millionth | 1982 |

Source: Motor Vehicle Manufacturers Association of the U.S., Inc. [1]Based on total U.S. factory sales data.